A STUDY OF JAPANESE TRAVEL HABITS AND PATTERNS
Volume 2

U.S. DEPARTMENT OF COMMERCE | UNITED STATES TRAVEL SERVICE
Office of Research and Analysis

A STUDY OF JAPANESE TRAVEL

HABITS AND PATTERNS

Volume 2

Results of an exploratory study assimilating secondary data and personal interviews with individuals representing organizations of the Japanese travel trade.

Conducted by
Gaither International, Inc.

for

UNITED STATES DEPARTMENT OF COMMERCE
UNITED STATES TRAVEL SERVICE
Office of Research
and Analysis

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TABLE OF CONTENTS

Page

DEFINITIONS

A variety of terms have been used in the analysis and presentation of the data derived from this survey. Although many are self-explanatory, they are defined here for ease of reference by the reader.

Alaska Visitors:	Persons who went to Alaska on their last trip abroad, or who stopped over there for one day or more en route to another destination. Too few Alaska visitors were found to permit separate statistical analysis.
Domestic Travellers:	Individuals who report having taken a trip of 200 kilometers or more, lasting 48 hours or more, within Japan, but who have not taken a trip outside of Japan during the two years prior to the survey.
First-Time Travellers:	Individuals who report that their last trip abroad was their first.
Guam Visitors:	Persons who went to Guam on their last trip abroad, or who stopped over there for one day or more en route to another destination.

Hawaii Visitors: Persons who went to Hawaii on their last trip abroad, or who stopped over there for one day or more en route to another destination.

Income Level: The income categories shown in the report actually refer to the stated monthly expenditures of the family, as reported by the respondent. Because of the compensation systems used in Japan and because of customs of polite usage, this is judged to be a more accurate indicator of relative economic standing than are income levels *per se*.

Intercontinental Travellers: Individuals who report having taken a trip outside of Japan during the past two years, and whose last trip went beyond the perimeter defined as "Pacific Area". They may also have stopped at destinations within the Pacific Area while en route. The accompanying map shows the general limits of the perimeter used for delimitation. All significant U.S. destinations except for Guam are defined as "Intercontinental".

International Travellers: Individuals who report having taken a trip outside of Japan at least once during the two years prior to the survey. For purposes of this study, Okinawa has been considered as outside of Japan.

Mainland Visitors: Persons who went to the mainland of the United States on their last trip abroad, or who stopped there for one day or more en route to another destination.

Net United States Visitors: Individuals who visited any U.S. destination on their last trip abroad. The category includes both those for whom the U.S. was their final destination, and those for whom it was a stopover point of one day or more.

Non-U.S. Travellers: Individuals who travelled internationally during the two years prior to the survey, but who did not visit the United States on their last trip abroad.

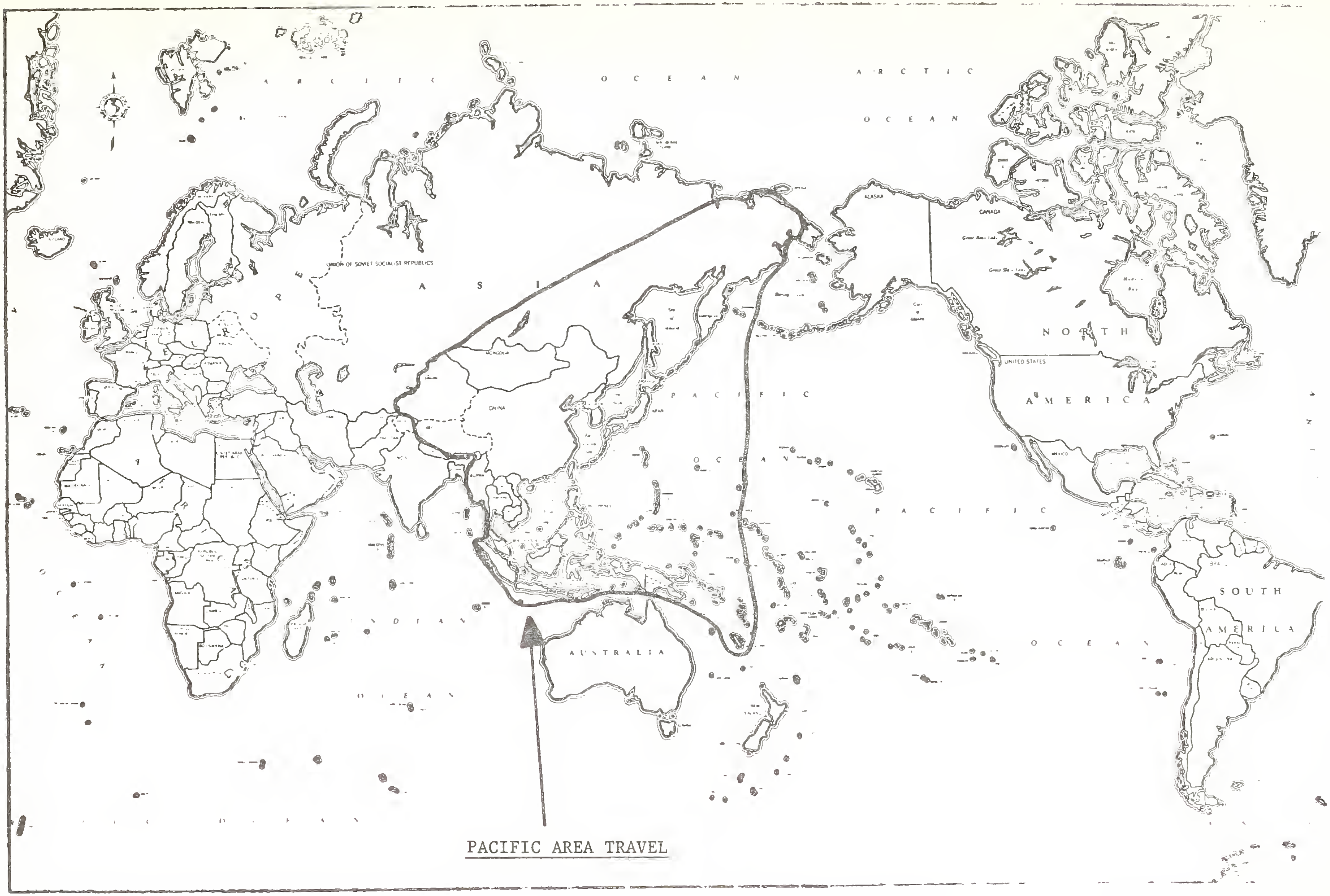
Pacific Area Travellers: Individuals who report having taken a trip outside of Japan during the past two years, but whose last trip did not go beyond areas relatively near to Japan. The accompanying map shows the general limits of the perimeter used for delimitation. Guam falls within this perimeter and is considered as "Pacific Area"; Hawaii falls outside of it and is considered as "intercontinental".

Regions: The division of the country into regions is shown on the sketch map immediately following.

Repeat Travellers: Individuals who report that they have taken more than one trip abroad at some time, not necessarily within the past two years.

Total Population: The entire universe of study: adults (18 or older), residing anywhere in Japan except for a few remote areas judged to be too difficult of access and accounting for only 1% of the population. Okinawa, for purposes of this study, is not considered part of Japan.


HOKKAIDO
SEA OF
JAPAN
TOHOKU
KANTO
CHUBU
KEIHIN
KINKI
HANSHIN
KYUSHU
CHUGOKU/
SHIKOKU



PACIFIC AREA TRAVEL

INTRODUCTION

The United States Travel Service, in conjunction with Gaither International, Inc., has conducted a major personal-interview survey in Japan to obtain data on international travel habits and attitudes toward the United States as a travel destination.

The study focussed primarily on the international travel market, although a small number of domestic travellers were interviewed in order to assess their attitudes toward international travel and toward various international travel destinations.

The universe of study was defined as all adult Japanese (18 or older) throughout the country, with the exception of a few remote areas judged to be especially difficult of access. These exclusions are estimated to represent only 1% of the adult population. Okinawa, for purposes of this study, was not considered to be part of Japan.

The findings presented in the following pages were obtained from personal interviews in two stages. The first stage consisted of 16,644 interviews designed to locate international travellers and to determine their incidence in various segments of the population. The second consisted of 1865 interviews in detail with travellers of different types. Of these, 439 were domestic travellers; 734 were Pacific Area international travellers; 692 were intercontinental travellers as these have been defined. The first stage of the interviewing was completed in the fall of 1972. The second stage began in late 1972 and was completed in February, 1973.

A description of the sampling procedures and coverage is presented in the Appendix, under the title of "Technical Notes".

HIGHLIGHTS OF THE FINDINGS

I. Sources of International Travel

International travel from Japan, though growing rapidly, touches only a very small proportion of the population. Only 2% have made a trip abroad during the past two years, and less than 1% have made an intercontinental trip.

Broadly speaking, the international travel market is composed of the elite segments of the population --the best educated and the most affluent. Men constitute a disproportionately large share of all travellers, although women make up more than a third of those who travel intercontinentally. The market is rapidly expanding; more than seven out of ten travellers during these two years were going abroad for the first time.

II. The U.S. Share of the Travel Market

Twenty-eight percent of all Japanese international travellers report that the most distant point they visited on their last trip was some point on U.S. territory. When stopover travel is included, this percentage increases to 30%. Among intercontinental travellers, the U.S. share is 58% as a final destination, and 65% if stopover traffic is included.

Hawaii is the most important single U.S. destination, accounting for more than four out of ten travellers. Guam accounts for more than three out of ten. Only one out of five have the U.S. mainland as their final destination.

III. Characteristics of Travellers to the United States

Guam is essentially a final destination, not a stopover point. Visitors to Guam are generally very young; they come from the less affluent economic groups that travel internationally; they are usually taking their first trip outside of Japan. Four out of ten visitors are women.

Hawaii and the mainland represent both final destinations and stopover points on longer trips. In both cases, one out of four visitors is there on a stopover basis, although that stopover may be a relatively long one in the case of the mainland.

The characteristics of the visitor to Hawaii are in some ways similar to those of the visitor to Guam; but generally the Hawaii traveller is more affluent, more sophisticated, perhaps more venturesome. Visitors to the mainland are more affluent still; they tend to be somewhat older, although there is an important proportion of the very young; they include a higher proportion of experienced travellers. They are especially well educated, and most claim an ability to speak English.

IV. General Characteristics of International Travel

Pleasure is far more significant than business as a reason for travel from Japan. Only 17% of the international travellers took their last trip primarily for business. For travel to the U.S. mainland, however, business and study are the principal motivations. A small but significant minority comes to the mainland to visit friends or relatives. Only one out of four comes to the mainland for the classic pleasure travel, which is characterized primarily by sightseeing and enjoying scenic attractions.

The average overseas trip for the Japanese is a very short one, reflecting the usually brief time available for pleasure travel under the Japanese system of minimal vacations. Two out of three trips are for a week or less. The median length of stay in both Guam and Hawaii is less than a week; on the mainland, it is two weeks.

Tour travel is exceptionally popular. Nearly two out of every three international trips are taken through tours, even more among those who visit Guam or Hawaii. But only one out of three visitors to the mainland comes on a tour.

Virtually all international travel is of course by air. Japan Airlines dominates the market. Pan American holds second place, but at a great distance.

Almost all Japanese travellers stay in hotels while outside of Japan. The proportion is somewhat less on the U.S. mainland, but it still reaches 85%.

The average international traveller from Japan estimates that he spent approximately 335,000 yen in all on his last trip. At July, 1973 rates of exchange, this is roughly the equivalent of $1265 dollars. The average trip to Guam costs 244,000 yen ($920); to Hawaii, 481,000 yen ($1815); to the mainland, 704,000 yen ($2655). But the dollar figures are deceptive because of the great recent fluctuations in exchange rates.

Roughly 60% of the total trip costs are pre-paid or committed in Japan, whether the travel is on a tour or an individual basis. The balance is used for discretionary spending while abroad.

Travellers who go abroad more than once a year amount to only 4% of the total, but account for nearly one out of five trips that are taken. Their travel tends to be more business-oriented, and to be over somewhat shorter distances. When all trips rather than all travellers are taken into consideration, the apparent U.S. share of the travel market diminishes somewhat, as do the shares of all of the other more distant destinations.

V. The Image of the United States

Guam, Hawaii and the U.S. mainland represent entirely different types of travel destinations, and have entirely different images. Broadly speaking, the desirability of all destinations tends to increase with distance. As between Guam and Hawaii, which compete in one context, Hawaii is the more favored destination; as between the U.S. and Europe, which compete in another context, Europe is the more favored destination.

The desirability of the U.S. mainland, and to some extent the islands, is greatest among the least experienced travellers. As experience increases, the desire to visit the United States diminishes and the desire to visit Europe grows.

A general characteristic of Japanese travel preferences is their lack of desire to return to a country that has already been visited. Few who have been to Guam, Hawaii, or the mainland wish strongly to return. The same is apparently true of almost all if not all other destinations abroad.

The image of Guam and Hawaii is the image of a tropical resort. Both are positive images, but Hawaii much more strongly so. The image of the mainland centers on its big cities and its technological society. Secondarily, there is a significant undercurrent that suggests that the mainland is the best place to visit not only for business reasons, but also to learn more about how foreigners live and behave. It is the best place to "understand more about the world" --the foreigners, it is most important for the Japanese to understand. Europe, however, holds the image of scenic beauty, of museums, of a sense of history, which appeals to the Japanese traveller so strongly. To this is added the desirable element of great distance, which enhances its attraction.

Japanese travellers are relatively well informed about the major and well-publicized U.S. attractions, such as Niagara Falls and Disneyland. They are interested in sightseeing. But of primary interest are the big cities that they associate strongly with the United States, such as New York. Among "attractions" per se, there is significantly greater interest in scenic attractions such as the Grand Canyon, than in such man-made creations as Cape Kennedy or the Statue of Liberty.

VI. Miscellany

Nearly six out of ten international travellers make their travel decisions in consultation with or under the direction of someone else. In 70% of the cases, the choice of airline is not the traveller's. In half the cases, all or part of the cost of his trip is being paid by someone else --a fourth of the time by his employer.

International travel is rarely taken on short notice. An average of two months of planning is involved; only 8% begin their preparations less than a week before departure. Small but substantial numbers make significant preparations, such as buying new clothes or reading about the country they will visit.

Almost all payment for international travel is made in cash. Only one out of ten travellers uses some extended credit system. The cash comes from personal savings in eight out of ten cases.

Approximately nine out of ten visitors to any of the U.S. destinations obtains some information about them before his departure. But much of the information is broad-focus, obtained through the general media. Four out of ten travellers say they would have liked to have more information about the U.S. destination they last visited, primarily on the customs and lifestyle of the people, and on familiarization with the language --which is the principal problem they anticipate and that they face in practice.

SOURCES OF INTERNATIONAL TRAVEL AND PERSONAL CHARACTERISTICS OF THE INTERNATIONAL TRAVELLER

Incidence and Sources of Travel

International travel from Japan, though growing rapidly, touches only a very small proportion of the population. Of the adult population as a whole, only 2% report having made a trip outside of Japan during the two years of 1971/72.

International travel, of course, includes nearby areas as well as those more distant. Those who have travelled intercontinental distances represent slightly less than 1% of the population.

With the magnitude of international travel so small, it is difficult to measure with any precision the extent to which the propensity to travel varies among all but the most distinctive segments of the population. Age, for example, does not show any significant correlation to travel. But it would appear that men travel internationally more than women (3% have done so in the past two years, as compared to 1%). The better educated clearly travel more than the less well-educated. Only 1% of those with minimal education have travelled abroad, and only 2% of those with high school education have done so; but the proportion increases to a full 7% among those who have had a university education, and half of these have travelled intercontinentally.

Language fluency is another factor which is directly related to travel abroad --though not as much as might be expected. Ten per cent of all Japanese who speak English say they have travelled abroad during the past two years, and 15% of those who claim to speak other languages have done so. Further, two-thirds of their travel has been intercontinental. Nevertheless, the fact that 10% have travelled means that 90% have not; the great majority, apparently, use their language ability only in Japan.

In geographic terms, the Keihin area --the Tokyo-Yokohama metropolitan area-- is the primary source of international travel, and particularly of intercontinental travel. Between four and five per cent have travelled internationally during the past two years from Keihin, and half of this total represents intercontinental travel. Hanshin --roughly the Osaka-Kobe metropolitan area-- is second: 4% have travelled internationally from this area, and between one and two per cent of them for intercontinental distances. Kinki (the region surrounding Hanshin) and Kanto (the region surrounding Keihin) follow in importance, Kinki with 3% and Kanto with 2%.

There is a greater incidence of international travel on the part of Japanese living in the southern regions than those living in the northern regions. Over the last two years Hokkaido has represented the least important source of international travel in Japan. Less than half of one per cent report any international travel.

Characteristics of International Travellers

The age profile of international travellers does not vary greatly from the age profile of the population as a whole. Intercontinental travellers, however, tend to be younger than those who travel just within the Pacific Area.

Men constitute a disproportionately large proportion of international travellers, as could be expected. More than seven out of ten international travellers are male. But women are more important factors in intercontinental travel than they are in international travel as a whole; they make up more than a third of the long-distance travel group.

The travel market is growing rapidly in Japan. Of all those who have taken a trip abroad during the past two years, 72% were going abroad for the first time. Heavy proportions of these were of the youngest age group, of modest economic means, and women. (Eight out of ten women who went abroad during this period were doing so for the first time.)

Broadly speaking, however, the international travel market is composed of the elite segments of the Japanese population --the best educated and the most affluent. The greater the distance from Japan, the more pronounced these characteristics become. Forty-one per cent of all international travellers have attended university (as compared to roughly a sixth of all domestic travellers, and roughly an eighth of the adult population as a whole). Thirty-two per cent claim to speak some foreign language (30%, English) as compared to some 17% of the domestic travellers within Japan and only 8% of the population as a whole. Forty per cent hold executive or junior executive positions, as compared to only half as many among domestic travellers; more than a third claim monthly expenditures (income level) in excess of ¥100,000 per month (roughly $375 at current rates of exchange) as compared to only a fifth of those whose travel is limited to the domestic area, etc.

These characteristics are even more pronounced among intercontinental travellers than they are among those international travellers whose travel has been closer to home, within the Pacific Area. The intercontinental traveller is better educated and more affluent still.

Table I summarizes the major characteristics of four kinds of travellers: the international traveller as a whole; Pacific Area travellers; intercontinental travellers; and travellers within Japan.

Although this broad picture emphasizes the elite traveller, there are at least two smaller but distinctive groups that should be noted. One of these is the very young, often low-income traveller who is venturing abroad for the first time. The second is the middle-aged, often middle-income executive who travels frequently for great distances, almost invariably for business. Each of these is significant, though for different reasons. Each follows a pattern of travel which may or may not coincide with the mainstream, the first guided perhaps primarily by the pressures of vogue or fashion, the second by the requirements of business. Each is referred to from time to time in the balance of this summary.

DEMOGRAPHIC PROFILES OF TRAVELLERS

	All International Travellers	Pacific Area Travellers	Intercontinental Travellers	Domestic Travellers
	%	%	%	%
Age Group				
Under 31	36	33	43	34
31-45	32	35	26	33
Over 45	32	32	31	23
Income Level *				
Under ¥80,000/mo.	31	35	23	41
80,000-119,999	28	30	25	30
120,000 or more	22	18	28	6
Not reported	19	17	24	23
Sex				
Men	71	75	63	54
Women	29	25	37	46
Travel Experience				
First trip	75	78	70	N/A
Repeat travellers	25	22	30	
Foreign Languages				
Speaks a foreign language	31	23	48	15
Does not	69	77	52	85
Educational Level				
University level	41	34	56	18
Lower than university	59	66	44	82

* See "Definitions" for explanation of income level on page 59.

CHARACTERISTICS OF INTERNATIONAL TRAVEL

Destinations

The United States is a major destination for Japanese international travel. But the bulk of U.S. travel is limited to the major Pacific islands, Hawaii and Guam. The U.S. mainland is much less significant.

Twenty-eight per cent of all Japanese international travellers report that the most distant point they visited on their last trip abroad in 1971 or 1972 was some point on U.S. territory. Another 2% report that they stopped over on U.S. territory en route to some other destination.

As a final destination, U.S. territory is nearly three times as popular as Europe, which was visited "last time" by 10%. It is second only to the broad composite of countries in the Southeast Asia area, which are both geographically convenient for vacation travel and economically important for business travel.

Only one out of five travellers to a U.S. destination cites the U.S. mainland as his most distant final point, however. More than four out of ten go to Hawaii, and almost all of the remainder to Guam.

Guam, relatively close to Japan, falls within the Pacific Travel Area. Within that segment of the international travel market, it accounts for 13% of the last trips taken by travellers. Hawaii and the mainland fall into the Intercontinental market, and compete with a radically different spectrum of destinations. Within the Intercontinental market, Hawaii alone accounts for a full 40% of the last trips taken. The U.S. mainland, with 18%, accounts for less than half as many. But between them, these two U.S. areas constitute the final destination for nearly six out of ten intercontinental travellers --and even more use them as stopover points en route to other countries.

Given the great distances involved in intercontinental travel from Japan, stopover visits in countries that do not represent the final destination are quite common. Often, there is no "final destination" as such; a trip may be scheduled to visit several countries of equal importance to the traveller. Stopovers of twenty-four hours or more thus constitute a major element in the travel market. When stopovers and final destinations are taken together, the incidence of visits to both Hawaii and the mainland are seen to increase by more than a third. Both are important interim destinations. Guam, however, is not; almost everyone who visits Guam goes no further.

Table II summarizes the percentages of all travellers who report having visited each major area on their last trip during the past two years, either as the "most distant point" visited, or as an interim destination or stopover.

The three U.S. destinations represent, in effect, three different travel markets. They have different characteristics and appeals, and the nature of the travellers who visit them are substantially different as well. Following is a brief description of each of them, in terms of the travel patterns they reflect.

1. Guam

Guam is essentially a final destination, not a stopover point. It is not a destination that travellers can take advantage of some other trip to visit en route. Close to Japan and promoted as a tropical resort, its share of travel is especially high among the young; among the lowest income categories of international travellers; among women; and among those who are taking their first trip outside of Japan. It is often a honeymoon destination, and promoted as such.

Seventy-four per cent of those who visit Guam are 30 or younger. Nearly half have incomes of under 80,000 yen per month (at current exchange levels, about $300). Forty per cent of all visitors are women. Eighty-seven per cent have never been outside of Japan before.

INCIDENCE OF VISITS TO MAJOR DESTINATION AREAS

	Most Distant Point (Final Destination)			All Visits (Including Stopovers)		
	All International	Pacific Area	Intercontinental	All International	Pacific Area	Intercontinental
	%	%	%	%	%	%
U.S. Territory (Net)	28	13	58	30	13	65
Guam	9	13	-	9	13	-
Hawaii	13	-	40	17	-	54
Mainland	6	-	18	8	-	25
Southeast Asia/Okinawa	59	87	1	61	87	5
Europe/U.K.	10	-	31	11	-	33
Canada	1	-	2	2	-	5
Other	3	-	8	5	-	14

2. Hawaii

Hawaii plays two roles in the international travel market. It is a highly desired destination in itself, and is often the final destination of a trip; but it is also a favored stopover point for travel to other destinations, and intercontinental travellers frequently take advantage of other trips to visit Hawaii en route.

Seventy-four per cent of all those who visited Hawaii on their last trip abroad say that this was their most distant point --their final destination. Nineteen per cent say they stopped over in Hawaii en route to the mainland of the U.S.; 3%, en route to Canada; 3%, en route to Europe, and the balance to other destinations.

The Hawaii visitor is thus a mixture of those who travel through the islands en route elsewhere, and the majority --three out of four-- who pick it as a final destination on its own merits. In either case, it is more difficult and more costly to reach than Guam. The demographic characteristics of the Hawaii visitor reflect these mixed influences.

There are certain parallels between the characteristics of those who go to Hawaii and those who go to Guam. The most striking relates to sex: Hawaii's "share of market" is greater among women than among men, and 40% of all its visitors are women --the identical proportion found in Guam. But other data indicate that the Hawaii visitor is, on the average, more affluent, more sophisticated, perhaps more venturesome than the visitor to Guam --though the visible appeals of the two destinations appear to be quite similar, and to strike responsive chords in many similar segments of the population.

Hawaii is more popular as a destination among those who have not travelled outside of Japan before, just as is Guam. But in Hawaii, the proportion of all visitors who are "first-time" travellers is lower --74%, rather than the 87% found in Guam. Hawaii's share of market (as a final destination) is nearly twice as high among the lowest income categories of international travellers as it is among the highest, just as is the case in Guam. But because Hawaii is visited by a broader spectrum of travellers, these low-income groups represent only a fourth of all those who go there. The median income of the Hawaii visitor is roughly 105,000 yen, nearly 40% higher than the median income of the visitor to Guam. And although educational levels are similar, the Hawaii visitor is more likely to claim to speak English (33%, as compared to 22% for the visitor to Guam).

Hawaii holds an appeal to the young, just as Guam does. But it also holds a strong appeal for the older travellers. Only the middle age groups do not appear to choose it as a destination in substantial numbers. The contrast to Guam is striking. Forty-six per cent of those who pick Hawaii as a final destination are 30 or younger. But 34% are over 45, as compared to only 10% of those who go to Guam.*

3. The Mainland

The mainland, as Hawaii, is both a destination in itself and a stopover point en route to other destinations. The same proportion of visitors as in the case of Hawaii, 74%, report that the mainland was their final destination on their last trip. Twenty-six per cent visited it only as a stopover point.

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* The middle age groups travel more frequently than others. When all trips rather than all travellers are taken into account, their importance in the Hawaii market becomes somewhat greater than these figures would suggest.

Roughly one out of eight visitors to the mainland stop there on their way to points north or south in the western hemisphere --7% en route to Canada, 6% en route to Latin America. Roughly the same proportion go through the United States on their way to or from Europe (12%).

Within the mainland itself, the principal final destination is the eastern seaboard, usually New York. More than a third of all those who come to the mainland have the East as their destination (37%). The western region is the final destination for 25%. Other parts of the country make up the remaining 12%.

Japanese visitors to the mainland customarily visit more than one city or one region during their stay. The western region is of course the most frequented, probably as a rest stop: 84% of all who came to the mainland say they were in the western area for a day or more. Fifty-five per cent say they visited the eastern seaboard, even though it may not have been their final destination. Twenty-seven per cent report having stopped over in the central part of the country, and 22% say they visited some part of the south, often Miami. The Great Lakes region accounts for still another 5%.

On average, the Japanese visitor to the mainland visits two regions of the country before leaving.

Just as in the case of Hawaii, the two types of visitor to the mainland --those who make it their final destination and those who pass through it en route to some place more distant-- provide mixed influences on the demographic profile of the traveller. But in the case of the mainland, the differences between the "final destination" visitor and the stopover visitor are especially sharp.

The traveller who has the mainland as his final destination comes in larger proportion from the younger elements of the Japanese international travellers than from the older; to a slight extent, he comes more from the middle income categories than from either the high or the low; and he tends to come more from the first-time travel segment than from the repeat travel segment. The share of travel among men and women is relatively uniform.

When stopover travel is included, however, the picture changes. All visitors to the mainland taken together are more likely to come from the most affluent segments of the international traveller population. They are more likely to come from the middle age group; more likely to be men; and more likely to be repeat travellers rather than first-time travellers.

In overall terms, therefore, the profile of the typical visitor to the mainland is one of an affluent, well-educated man, middle-aged or older, who holds a responsible position at his work. A third of these visitors fall into the highest income category (120,000 yen per month or more, roughly equivalent to $450 dollars). Only one out of six falls into the lowest. The median income falls at over 110,000 yen. Seventy-one per cent of these visitors have a university education; 65% claim to speak English. Fifty-nine per cent are over 30 years of age. Fifty-four per cent hold executive positions in their companies, although these are not necessarily <u>high</u> executive positions.

The undercurrent of the other type of traveller should not be disregarded, however. Sixty-nine per cent of the visitors are travelling outside of Japan for the first time. Eleven per cent are students. Four out of ten are 30 years of age or younger, and 7% are under 21.

These latter types of visitor tend to be more numerous among those who make the mainland their final destination. They are also more likely to limit their travel to the west coast. The western region has a higher "share of market" as a final destination among young people than among older; among women than among men; among first-time travellers than among repeat travellers. The eastern seaboard shows precisely the reverse pattern --its highest share among the middle age group, among men, and among experienced travellers.

Table III summarizes the demographic profile of all visitors to each of the three principal U.S. destinations --Guam, Hawaii, and the mainland. Table IV shows the "share" each destination commands, both as a final destination and with final and stopover visits combined.

Reasons for Travel

Pleasure is far more significant than business as a reason for travel. Only 17% of the international travellers took their last trip primarily for business reasons. Fifty-two per cent say they travelled primarily for pleasure, and smaller proportions mentioned specific activities that relate to that general concept.

"Pleasure" travel takes different forms at different travel destinations. For the Japanese, sightseeing appears to be by far the principal activity in this category --either enjoying the scenery or seeing specific points of interest. But taking a quiet and restful vacation falls in this category as well, and although only 1% mention this spontaneously as a reason for travel, it ranks as the second most important reason when selected from a prepared list of travel purposes. And 9% mention specifically that they took their last trip abroad for their honeymoon, which certainly falls into the general category of pleasure travel.

DEMOGRAPHIC PROFILES OF VISITORS TO U.S.

	Guam	Hawaii	Mainland
	%	%	%
Age Group			
Under 31	74	45	41
31-45	16	21	32
Over 45	10	34	27
Income Level *			
Under ¥ 80,000/mo.	45	25	17
80,000-119,999	21	28	25
120,000 or more	14	27	34
Not reported	20	20	24
Sex			
Men	60	60	69
Women	40	40	31
Travel Experience			
First trip	87	74	69
Repeat traveller	13	24	30
Not reported	-	2	1

* See "Definitions" for explanation of income level on page 59.

DESTINATION SHARES OF THE TRAVEL MARKET
AMONG DIFFERENT MARKETING AND DEMOGRAPHIC GROUPS*

	Guam		Hawaii		Mainland	
	Final Desti-nation %	All Visits %	Final Desti-nation %	All Visits %	Final Desti-nation %	All Visits %
Age Group						
Under 31	30	30	43	56	21	24
31-45	6	6	32	44	19	32
Over 45	4	4	42	58	14	22
Income Level**						
Under ¥80,000/mo.	17	17	54	59	15	19
80,000-119,999	9	9	46	60	20	25
120,000 or more	10	10	28	51	17	30
Sex						
Men	10	11	36	51	19	27
Women	21	22	46	58	18	22
Travel Experience						
First trip	14	15	42	57	20	25
Repeat traveller	8	8	33	45	15	27

* Share figures shown for Guam are computed within the Pacific Area market. Figures for Hawaii and the mainland are computed within the Intercontinental market.

** See "Definitions" for explanation of income level on page 59.

Other reasons for travel are minor compared to these. Eight per cent took their last trip abroad because they won it as a prize or were invited by others. Six per cent went abroad to study. Another 6% went abroad to "see how others live", and 4% travelled to visit friends or relatives.

The broad and general concept of travelling for pleasure or sightseeing is less important as a reason for intercontinental travel than it is for travel within the Pacific Area, although it still leads all others. Long-distance travel is more likely than short-distance travel to be intended for some specific and practical purpose. Business travel, for example, is more common for the intercontinental traveller than for the Pacific Area traveller. Honeymoon travel is mentioned more often by intercontinental travellers, as is travel for study or for visiting friends and relatives.

Those who travel for business or study often combine sightseeing with their trip, of course. On the average, both students and businessmen say they spend more than a third of their time abroad on pleasure-related activities. The same is true for almost all others who travel for specific purposes not directly related to pleasure. As a result, when primary and secondary reasons for travel are added together, pleasure travel --sightseeing-- assumes even greater importance. It is mentioned by a total of three out of four Pacific Area travellers, and by nearly two out of three intercontinental travellers.

It has been mentioned that the three U.S. destinations --Guam, Hawaii, and the mainland-- represent three different kinds of travel markets. The stated purposes of travel confirm this.

Among those who travel to Guam, four out of ten give general pleasure/sightseeing as their principal reason for going --and another four out of ten say they went there specifically for their honeymoon. Selecting from a list of options, travellers to Guam say they go there for a restful vacation, for the scenery, and to enjoy the beaches. Only one in fourteen reports that he goes to Guam for business.

Among those who travel to Hawaii, the pleasure orientation is almost as strong, although the great weight of honeymoon traffic is somewhat less. Nearly half say they went to Hawaii for pleasure/sightseeing, and a still substantial proportion, one out of five, say they went there for their honeymoon. Travellers say they go there for rest, for scenery, for the beaches, as in Guam; to these they add the dimension of seeing specific attractions of interest. Fewer than one in ten go there for business.

The mainland is quite different. There, the principal reason for travel is business --mentioned by a third of those who go there. Pleasure/sightseeing holds a weak second place as a primary reason for travel, mentioned by fewer than one in four (though the combination of business with pleasure brings it up as a <u>secondary</u> reason to almost two-thirds of the visitors). A number of specific, individually minor reasons for travel carry great weight in attracting visitors to the mainland: one in five goes there to study; one in seven goes there "in order to see how others live"; one in eight, surprisingly, visits the mainland to see friends and relatives --a higher proportion than is found for any other major destination. But whereas Guam and Hawaii are pleasure destinations, the mainland definitely is not.

Table V summarizes these seven principal reasons for travel, by type of traveller and for each of the three main destinations in the United States.

These major reasons for travel find differing levels of emphasis among different types of travellers. Among the intercontinental travellers, women are more likely than men to travel for pleasure; to travel for their honeymoons; to visit friends and relatives. First-time travellers are heavily oriented toward pleasure travel, and of course --on a much lesser scale-- to honeymoon travel. Repeat travellers are strongly business-oriented (although even among this group, and even though business is the principal single reason given, 65% give non-business reasons for going abroad).

PRIMARY REASONS SPONTANEOUSLY GIVEN FOR TRAVEL

	All International %	Pacific Area %	Intercontinental %
Pleasure/sightseeing	52	57	40
Business	17	14	23
Honeymoon	9	7	12
Invitation/prize	8	10	4
Observe how others live	6	5	8
Study	6	4	11
Visit friends/relatives	4	4	6

	Guam %	Hawaii %	Mainland %
Pleasure/sightseeing	41	47	23
Business	7	9	32
Honeymoon	39	21	4
Invitation/prize	7	5	1
Observe how others live	1	7	14
Study	1	8	20
Visit friends/relatives	1	5	12

Age is a major factor in defining the type of intercontinental travel that is undertaken. The very young and the very old are heavily pleasure-oriented. The youngest group is of course the most likely to be travelling for their honeymoon; one out of four of those under 31 mention this as their reason for travel. But the middle age group --between 31 and 45-- is a rather special one. This is the group that is most heavily business-oriented, and the most likely to be a frequent traveller. Nearly half of those in this category give business as their reason for travel; fewer than three out of ten say they travel for pleasure.

This middle-age group apparently relates as well to the middle-income group, which shares some of the same characteristics, though to a less pronounced degree. It is the least affluent and the most affluent who are most likely to travel for pleasure; for the middle-income group, pleasure is only co-equal in importance with business.

Companionship During Travel

Nearly six out of ten international travellers have the companionship of family or friends when they go abroad. More than half of those who have a companion, however, have only one --usually a friend, often the spouse. A full family outing, including the children, is relatively rare (5%).

Travelling alone becomes more common as the distance from Japan increases. The purpose of travel is also undoubtedly a factor; the traveller is less likely to have his wife or a friend (male or female) with him when he travels to the mainland of the United States --probably for business-- than he is when he travels to Guam --probably for pleasure. Thus, while 87% of those who go to Guam go in the company of others, the proportion drops to 63% when Hawaii is the destination, and to only 41% when the trip is to the mainland. (Yet it is interesting to note that if the traveller is accompanied at all, the group he is travelling with tends to become larger as the distance increases.)

Women are far more likely to travel with companions than are men (74%, among those who travel intercontinentally, as compared to 46%). Young people are more likely to be accompanied than old (63%, as compared to 49%). But the incidence of companionship during travel is not affected by whether the traveller is experienced, or is going outside of Japan for the first time.

This study deals directly only with adults. Some children, of course, accompany their parents on their travels. Table VI outlines the total sex and age composition of all people who travelled outside of Japan during the two prior years, separately for Pacific Area and intercontinental travellers --based on a total of all individuals who were reported to have travelled, even though the report may have been made, for example, by a child's parents. A total of 3274 individuals have been tabulated for this table, as compared to the 1426 adults with whom interviews were directly conducted and to whom all other data on international travel refer.

Length of Trip

The average international trip is a very short one, reflecting the usually brief time available for pleasure travel under the Japanese system of minimal vacations. But the time elapsed on the trip varies greatly by destination.

Overall, taking all international travel into account, two out of three travellers were gone for a week or less on their last trip. Nearly half --48%-- spent less than a week away from home. For travellers in the Pacific Area, 78% of all trips were for a week or less.

The situation for intercontinental travel is different. But even when distances of this magnitude are involved, one out of three travellers is gone from home for a week or less. For the Japanese, western-style vacations are a rarity; the custom is to take time off from work, if at all, for only a few days at a time.

SEX AND AGE DISTRIBUTION OF INTERNATIONAL TRAVELLERS*

	Pacific Area Travellers		
	Male	Female	Total
	%	%	%
Age			
Under 6	1	2	1
6 - 10	-	-	-
11 - 15	-	-	-
16 - 20	1	8	3
21 - 30	24	39	27
31 - 40	25	10	21
41 - 50	18	13	17
Over 50	19	25	20
Not reported	12	3	12
	Intercontinental Travellers		
	Male	Female	Total
	%	%	%
Under 6	1	1	1
6 - 10	1	1	1
11 - 15	-	2	1
16 - 20	1	6	3
21 - 30	28	49	35
31 - 40	21	12	17
41 - 50	23	10	18
Over 50	21	17	19
Not reported	5	2	7

* Percentages represent ages of both the international traveller himself and those persons who accompanied him in his international travel.

Among the U.S. destinations, it is Guam that shows the shortest average length of stay. Seventy-eight per cent of all travellers to Guam report that they stayed there less than one week. The median stay is for four days.

Only 29% of those who visited Hawaii were away from home for less than a week in all --22% were away for a month or more-- but the median stay in Hawaii itself is similar to Guam: five days. The situation there is much more diverse than in Guam, and stays range frequently from as little as one or two days --largely stopover travel-- to as much as a week. But only one visitor in ten stays in Hawaii for more than a week, even though the trip of which Hawaii forms a part lasts much longer.

Visits to the mainland fall into an entirely different category. Less than 1% of those who go to the mainland are on trips that will last less than a week. The most common duration of such a trip is a month; 47% report this particular time span. And another 25% are away from home for more than this.

The length of stay on the mainland, however, regardless of the overall length of the trip, is highly variable. The median is a stay of two weeks. But more than one out of four travellers stay for a week or less, and at the other extreme, nearly four out of ten stay for longer than two weeks. It is obviously a function of the purpose of travel as well as the itinerary; the very young, for example, the women, and those who have left Japan for the first time are those most likely to stay on the mainland for longer periods of time --probably for study or for extended visits with relatives. Business travellers are more likely to move on to other destinations or to return home.

Tour and Individual Travel

Tour travel is exceptionally popular in Japan Nearly two out of three travellers (63%) went abroad through a tour on their last trip, and the proportion varies only slightly between travel within the Pacific Area and travel for intercontinental distances.

The mainland of the U.S. is a clear exception to this pattern, however. Only 34% of those who visited the mainland on their last trip went there with a tour. By contrast, 76% of those who went to Hawaii, and a full 80% of those who went to Guam, contracted tours to go there. This clear lack of tours to the mainland may be related to the low incidence of pleasure travel that has already been mentioned.

The use of tours is widespread among all demographic groups. But it is especially so among the less affluent travellers, among those who are going abroad for the first time, and among women. Tours are more important to both the older and the younger traveller; the middle age group, primarily a business travel segment, uses them in only 42% of the cases.

Most tours are pleasure-oriented. Two out of three tour travellers (40% of the travellers), asked what the theme or purpose of their tour was, mentioned only "pleasure" or a variant of this simple concept. No more than one out of twenty mentioned any other central theme, although such concepts as academic tours, cultural tours, business tours, sports tours --even honeymoon tours-- were each mentioned by a few. (Among travellers to Guam, 17% --one out of five tour travellers to that destination-- mentioned that their tour was a honeymoon tour.)

Tours that reach the mainland of the U.S. are less likely than others to have a pleasure theme --but even in this case, tours for pleasure are mentioned more than any other concept, by roughly one out of three of those who use them.

Travellers are generally unable to identify their tours by name, despite their widespread use. Overall, seven out of ten tour travellers could not recall either a "brand" name or the theme name of the specific tour they took. They identify them most often as, for example, "a tour arranged by the travel agent" or a tour arranged by some affinity group. An exception to this occurs among the travellers to Guam, who are highly tour conscious; three out of four of these can give the specific name of their tour. And tours to Hawaii are also better

known than the average, although they can be properly identified only by slightly better than four out of ten who used them.

Tours to the mainland of the U.S., on the other hand, are exceptionally poorly identified. Only one out of seven travellers who used them could recall their name. It seems probable that the ability to identify a tour reflects to some degree the intensity of commercial promotion that is put behind it, and these and other data suggest that mainland tours are only lightly promoted.

Among those few who can identify their tours by name, Jalpak tours are named more than any other (9%). Look tours are mentioned by 5%; Holiday by 3%; Diamond by 1%. (Diamond appears to be a negligible factor for all markets except Guam. There, it is identified as the tour sponsor by 10%, putting it in third place behind Jalpak (28%) and Look (23%).)

There is no clear consensus as to the criteria for choosing a given tour. Among seven alternative reasons from which respondents were asked to select, the destination countries that are offered by the tour are mentioned as the primary criterion more than any other, but still only by 13%. Recommendation by others (word of mouth) is a close second (11%). The purpose or theme of the tour is third (9%); the tour's length fourth (7%), and the types of people who will go on the tour is fifth (6%).

The travel agent's recommendation is next to last as a reason for choosing a tour, (4%), and the number of countries offered by the tour is last (1%).

The Use of Travel Agencies by Individual Travellers

Travel agents are often used, even when tours are not involved. Sixteen per cent of all international travellers use a travel agent independently for some function, representing more than four out of ten travellers who travel on an individual basis. The proportion is somewhat higher still for the more distant destinations; nearly half of the individual travellers, for example, use a travel agent when intercontinental trips are involved.

This pattern of use of travel agencies is fairly uniform among all demographic segments except one: the least affluent. Only one out of five individual travellers from the lowest income group uses a travel agency. The proportion increases to half among the middle income group, and to six out of ten among the most affluent.

The principal function of the travel agency is to book transportation space. But in one out of five cases, the agency arranges for a complete itinerary --the equivalent of a personalized tour. (For trips to Guam, these "individual tours" are booked by the travel agencies in half of the cases; for trips to Hawaii, in one out of four; for trips to the mainland, in one out of five.)

Half of the time a travel agency is used, it is used to book lodging as well as transportation. Together with the proportion that books a complete itinerary, this means that the travel agency is involved in more than simple transport bookings in seven out of ten cases of non-tour travel.

Means of Transportation

Virtually all of the international travel from Japan is of course by air. Only 6% go by ship.

Other means of transportation are used at times during portions of the trip, as supplementary transport. At some point in their journey, 24% of the international travellers use inter-city busses; 17% use a ship (primarily in the Pacific Area); 9% use a train. But airlines are clearly the major form of transportation at all stages.

The more affluent travellers; the younger travellers; and the travellers going abroad for the first time are generally the most likely to use these supplementary forms of transportation. The middle age group --the most business-oriented group-- is the least likely to use them.

These figures refer to inter-city transportation. Use of local transport is much more widespread. More than seven out of ten travellers of all types use local busses, probably sightseeing busses, at some point in their journey. Taxis are used by nearly half (46%), considerably more by the experienced traveller than by the neophyte.

No other form of local transportation assumes major significance: only 6%, for example, use rental cars --again, much more likely the experienced traveller (16%). But there are exceptions. One is Guam, where most of the travellers are abroad for the first time, and where 24% report having used a rental car during their stay. Private cars are used by only 14% of all travellers; but on the U.S. mainland, surprisingly, a full 37% report that they used a private car at some time.

Airlines Used, and Airline Preferences

Japan Airlines is by far the dominant carrier for these international travellers. Nearly two out of three travellers say they flew on JAL on their last trip, and 60% say they flew on it "most". It is the leader among all segments of the population and to all destination areas.

Pan American holds second place, but at a great distance. Overall, it is named by only one traveller as being flown on "most" for every ten who mention JAL. Cathay Pacific is a close third overall, though it is not a factor at all in the intercontinental market. Northwest is fourth.

Foreign carriers do fare somewhat better for certain specific destinations. The closest competition to JAL is found on the route to Guam, where one out of three travellers say they flew Pan Am "most" on their last trip. To the mainland, Pan Am is mentioned as having been flown on "most" by one out of seven travellers; to Hawaii, by one out of ten --a proportion it shares with Northwest.

A long list of flag carriers accounts, together, for a relatively small share of the overall market. No one of these is mentioned as having been flown on "most" by more than 1% of all travellers.

Even though JAL dominates this air travel, its position is not quite as universal as these figures alone imply. Though it is usually the airline flown on "most", it is not necessarily the <u>only</u> airline used in the course of a long trip. For example, although only 14% of those who visited the mainland of the U.S. say they flew "most" on Pan Am, a full 40% report that they flew on it at some stage of their journey. Other airlines, showing a still smaller share of the market in terms of being flown "most", also attract significant numbers of Japanese travellers on at least one leg of their trips.

Table VII shows the percentages reporting each leading airline as having been flown "most" and having been flown on at all during the last trip taken. (Airlines shown are limited to those recording 3% or more for international travel as a whole, and to airlines mentioned by 4% or more for travel related to the United States.)

As a general rule, foreign carriers tend to achieve better shares of travel among experienced (repeat) travellers than among those who are leaving Japan for the first time. Pan Am, for example, records more than twice as great a share --both in terms of flown at all and flown most-- from repeat travellers as from first-time travellers. This is not completely universal: Aeroflot, for example, shows a stronger share among first-time travellers and the very young, as does Northwest. But it is sufficiently widespread to suggest a consistent pattern.

Airline preferences for future travel tend to show a slightly more favorable picture for Pan American --though not for all foreign carriers. It might be thought that this is attributable to the fact that all the international travellers interviewed are now "experienced"; but even the domestic travellers --who have never been abroad-- express a greater preference for flying Pan Am than past travel practice has shown. The difference between preference and actual travel may be due to the fact, discussed in a later section, that most travellers do not themselves choose the airline they will fly on.

The expressed desire to fly on Pan Am in the future is roughly twice as great as the actual percentage reporting having flown on it "most" last time, among those who flew to Hawaii or to the mainland. (It is less in the case of Guam.) JAL remains dominant, of course, and no other airline is mentioned by substantial numbers at all for travel to U.S. destinations.

Lodging

Almost all Japanese travellers (91%) stay in hotels while outside of Japan, at least part of the time. One in ten stays in a private home at some point in his trip; smaller percentages stay in hostels or dormitories, tourist homes, or motels.

USE OF AIRLINES IN INTERNATIONAL TRAVEL

	All International		Pacific Area		Intercontinental	
	Used %	Used Most %	Used %	Used Most %	Used %	Used Most %
General						
Japan Airlines	64	60	61	60	69	62
Pan American	11	6	8	5	17	8
Cathay Pacific	6	5	8	7	2	-
Air France	5	1	1	1	15	3
Northwest	4	3	2	2	8	6
Lufthansa	4	1	1	1	10	2
Swissair	3	-	-	-	10	1
KLM	3	1	1	1	7	2
BOAC	3	1	-	-	7	2

	Guam		Hawaii		Mainland	
	Used %	Used Most %	Used %	Used Most %	Used %	Used Most %
U.S. Destinations*						
Japan Airlines	63	63	78	74	77	68
Pan American	43	33	18	10	40	14
Northwest	-	-	13	10	11	3
American	-	-	7	-	13	-
BOAC	-	-	4	3	10	4
United	-	-	6	-	16	-

* The airlines shown may have been used on any portion of a trip which went to or through these U.S. destinations.

In Guam, 92% stay in hotels. In Hawaii, 94% do. To the extent that there are departures from this pattern, they tend to occur more on the mainland, as a reflection both of the type of traveller and the different purpose of travel there. Eighty-five per cent do stay in a hotel at some point in their visit to the mainland; but 24% also stay in private homes, 12% stay in a motel, and 8% stay in a dormitory. Although they are always in a minority, all types of lodging other than hotels are more likely to be used by those who are abroad for the first time, and by the very young. Women, particularly, are more likely than most to stay in private homes.

Expenditures

The average international traveller estimates that he spent approximately ¥335,000 in all on his last trip. At current rates of exchange, this is roughly equivalent to $1265 dollars.

(Dollar values must be evaluated with great caution. The yen has increased in value relative to the dollar by more than a third since the beginning of 1971, the date to which some of these trips refer. If this same yen amount were spent in early 1971, it would have been equivalent to approximately $930 at that time. Different values have applied in the interim. In the interests of accuracy, therefore, yen figures are primarily used in the balance of this summary. Conversion to July, 1973 dollar values can be made by dividing the yen figures by 265.)

Expenditures vary greatly by destination, of course. The average Pacific Area trip costs only 38% as much as the average intercontinental trip. The average trip to the mainland of the U.S. costs nearly three times as much as a trip to Guam, and nearly half again as much as a trip to or through Hawaii.

Demographic characteristics of the travellers have some bearing on trip expenditures as well, although they are less meaningful than the differences that are caused simply by the differences in destination. Men spend slightly more than women; repeat travellers spend slightly more than first-time travellers;

the middle age group spends slightly more than the older, and the older, in turn, slightly more than the younger. But to a large extent, these differences are due primarily to the differences in travel patterns that have been described in an earlier section.

One demographic variable that does have major impact on the level of expenditure is, as could be expected, the income level of the traveller. The upper-income traveller spends nearly half again as much as the lower-income traveller on his average trip.

There is a major difference in expenditure levels, as well, between the tour traveller and the individual traveller. The individual traveller spends substantially more, regardless of destination. On average, he will spend more than a fourth again as much as the tour traveller, although the proportion of difference does vary from one destination to another.

Table VIII shows the total expenditure levels reported for each of these destinations and population segments. All figures are averages.

Any average, of course, can cover a wide spectrum of specific individual costs. There is a small but significant group (6%) that spends less than 100,000 yen on its international travel --in the area of perhaps $300. Among those who visit the mainland of the U.S., 14% spend more than a million yen in all --$4000 and more. The range of individual expenditure is as wide as the range of travel purposes and traveller characteristics.

Transportation costs, of course, account for a major part of the overall expenditure. But as a proportion of total cost, it does not vary that greatly; apparently, when a trip over great distances is involved, other expenditures increase almost in proportion to the expenditures for travel itself.

AVERAGE TOTAL EXPENDITURES FOR INTERNATIONAL TRAVEL

	Yen	Dollar Equivalents	
		Jan., 1971	July, 1973
All international travel	¥335,000	$930	$1265
Pacific Area travel	216,000	600	815
Intercontinental travel	567,000	1575	2140
Travel to Guam	244,000	680	920
Travel to/through Hawaii	481,000	1335	1815
Travel to/through mainland	704,000	1955	2655
Tour travel	310,000	860	1170
Individual travel	397,000	1100	1500
By income level (intercontinental):			
Less than ¥80,000/mo.	484,000	1345	1825
80,000-119,999	532,000	1480	2005
120,000 or more	673,000	1870	2540
By age (intercontinental):			
Under 31	545,000	1515	2055
31-45	602,000	1670	2270
46 or more	577,000	1605	2180
By sex (intercontinental):			
Men	585,000	1625	2210
Women	541,000	1505	2040
By travel experience (intercontinental):			
First-time travellers	562,000	1560	2120
Repeat	588,000	1635	2220

Since lodging is often booked in advance for both tour and individual travel, a substantial proportion of the overall cost of the average trip is committed or paid for in Japan prior to departure. Nearly six dollars out of every ten spent are pre-paid in this way; slightly more than four out of ten constitute the discretionary fund from which the traveller can spend at his choice while overseas.

It is interesting to note that there are few significant differences in the proportion that these discretionary funds represent in the expenditures of tour and individual travellers. The tour traveller spends less overall, but 42% of his expenditures are, on the average, spent outside of the framework of the tour price itself. The individual traveller spends more overall, but still only 43% of his total expenditures are made after he has left Japan.

The ways in which this money is spent differ between the two groups, however. And they differ to some degree as well from one demographic group of travellers to another.

As a broad generalization, six out of ten dollars spent are committed in Japan prior to departure. For tour travellers, two and a half of the remaining four dollars are spent for purchases --gifts, souvenirs, and the like. The balance is spent on food and drink, lodging (outside of the framework of the tour), local transportation, and miscellany --no single one of these categories representing a significant proportion.

For individual travellers, purchases of gifts and souvenirs account for much less --only one and a half out of every ten dollars; the necessities implicit in travelling as an individual account for the bulk of the remainder. Slightly more than one dollar out of every ten goes for lodging; another dollar goes for food and drink; the balance goes for local transportation and miscellany.

These generalizations are applicable for international travel as a whole. There are differences within them by destination, however. Individual travellers within the Pacific Area actually have a slightly smaller proportion of discretionary funds than the tour travellers, though the difference is minor. But the reverse is true for the intercontinental travellers, especially for those who are going to any of the three U.S. destinations.

The business traveller is the most likely to pre-pay the bulk of his expenses, and the least likely to spend money on gifts or diversions. It will be remembered that the business travellers are concentrated most in the middle age levels and the middle income groups, and are more likely to be found among the repeat travellers. Of those who travel intercontinentally as individuals, repeat travellers pre-pay 65% of all their expenses; middle-income travellers pre-pay 66%; middle-age travellers pre-pay a full 71%.

The ways in which different types of tour travellers spend their money is relatively uniform among all demographic groups. But individual travellers vary more widely. First-time travellers, for example, are more likely than repeat travellers to buy gifts and souvenirs --such purchases account for 15% of all the money they spend, as compared to 9% among the repeat travellers. The oldest travellers and the least affluent are more likely to spend a substantial share of their funds on such purchases --for each of them, gifts and souvenirs account for a full 20% of their expenditures. The middle-age group (the most business-oriented) is the least likely to spend money for these things --only 9%. The oldest travellers are the most likely to spend major amounts on miscellany such as sightseeing; the youngest, on the necessities of food and lodging. But other differences tend to be minor ones.

Regardless of the proportions involved, the absolute amounts spent for almost every concept tend --logically-- to be greater among the most affluent travellers, whether they travel alone or with a tour.

In terms of expenditures for transportation, the middle-age, middle-income business traveller appears to be the most significant single segment of the market, on a per capita basis. In terms of expenditures for all other activities while abroad, the most significant segment would appear to be centered in the high-income, older-age individual traveller, going abroad for the first time.

Table IX shows the proportions and amounts of discretionary funds available to tour and individual travellers to different destination areas. Table X summarizes the general distribution of the expenditures that are made.

Seasonal Patterns

There are no clear seasonal patterns to international travel. Trips abroad are likely to occur in any month of the year.

There are a few discernible peaks for the period 1971-72, but the differences are small and some of them may not be significant. February, May, and August stand out slightly when all international travel is averaged. December and January are low periods. Differences are somewhat more pronounced when only intercontinental travel is involved. December and January are low travel months for the intercontinental traveller, followed by a peak in February that reaches 11%. There is a decline again in March, a minor increase in April and May, another decline in June, and then a relatively significant peak in the months of July and August --13% in the first month and 12% in the second. Traffic holds at a moderate level during the fall, and drops to begin the cycle again in December.

Travel to Guam, specifically, shows a rather clear peak in April and May. More than a third of the last trips taken to Guam were taken in those months. Travel to the mainland of the U.S. also shows a clear peak, this one in July and August; again, a third of the last trips taken to the mainland began during this period. February and September show smaller peaks. Hawaii does not show a distinctive pattern.

AMOUNTS PRE-PAID AND DISCRETIONARY FUNDS

	Pre-paid/Committed in Japan		Discretionary Funds		Total
	%	Yen*	%	Yen*	
All international travellers	58	195,000	42	140,000	335,000
Tour travellers	58	181,000	42	129,000	310,000
Individual travellers	57	225,000	43	172,000	397,000
Tour Travellers					
Pacific Area	53	115,000	47	104,000	219,000
Intercontinental	61	304,000	39	191,000	495,000
To Guam	65	143,000	35	78,000	221,000
To/through Hawaii	61	268,000	39	172,000	440,000
To/through mainland U.S.	65	428,000	35	228,000	656,000
Individual Travellers					
Pacific Area	56	129,000	44	101,000	230,000
Intercontinental	58	421,000	42	305,000	726,000
To Guam	53	199,000	47	173,000	372,000
To/through Hawaii	52	349,000	48	321,000	670,000
To/through mainland U.S.	56	437,000	44	342,000	779,000

* Conversion rate, July, 1973: 265 to $1.00.

DISTRIBUTION OF EXPENDITURES

	Tour Travellers		Individual Travellers	
As Percentages Of all Expenditures	Pacific Area	Intercon-tinental	Pacific Area	Intercon-tinental
Tour price/primary transportation	53%	61%	39%	52%
Local transportation	2	4	5	6
Lodging	1	2	14	12
Food/drink	3	5	10	10
Purchases	32	21	21	13
Miscellany/sightseeing	9	7	11	7
As Average Yen Amounts*				
Tour price/primary transportation	¥115,000	¥304,000	¥89,000	¥376,000
Local transportation	5,000	21,000	12,000	40,000
Lodging	3,000	12,000	33,000	90,000
Food/drink	7,000	24,000	22,000	72,000
Purchases	70,000	102,000	48,000	95,000
Miscellany/sightseeing	19,000	32,000	26,000	53,000

* Conversion rate, July, 1973: 265 to $1.00.

THE PROFILE OF INTERNATIONAL TRAVEL DURING 1972

Whether for business or for personal reasons, some travellers take more than a single trip during any given year, and hence account for a disproportionate amount of travel and travel expenditures.

The bulk of the data in this study refers to individual travellers, regardless of the number of trips they may have taken. It is important, however, to place this information about people in its proper background context of traffic. This has been done by obtaining certain basic information about each international trip taken by each person during the twelve months prior to the survey, and giving equal weight to each such trip in the computation of traffic patterns.

The information discussed in this section, therefore, differs in concept from the material in other sections, and is intended to provide another perspective from which the travel market may be evaluated. It is based upon all trips rather than all travellers.

Incidence of Multiple Travel

The great majority of international travellers from Japan take only one trip abroad during any given year. It has been pointed out that most international travellers have never been abroad before at all. But 4% did take more than a single trip outside of Japan during the twelve months prior to the survey; and because of the frequency of their travel, this 4% of all travellers accounts in fact for nearly one out of five of all trips that are taken.

Multiple travellers are more likely to be men than women, and more likely to be from the middle age group than from those either older or younger. Their inclusion on the basis of the number of trips they have taken does not alter the demographic profile of the intercontinental traveller significantly, however, except in one dimension: where on the basis of travellers, first-time travellers represent 70% of the total, on the basis of trips taken, their importance

drops to a bare majority of 56%. The experienced traveller accounts for 44% of all trips taken, though only for 30% of all people who have gone abroad.

Destinations

The share of market that the United States represents is somewhat lower in terms of traffic than it is in terms of travellers. The United States was the destination for only 23% of the trips taken in 1972. (It was the destination for 28% of all travellers going abroad during the two years prior to the survey.)

The same pattern affects all of the more distant destinations, and all of those --like Guam-- that tend to be visited primarily by one-time travellers. The difference is made up by travel, primarily business travel, within the Pacific Area.

Table XI shows the percentages of all traffic to each major destination, and compares the figures to the percentages of all travellers going abroad once or more.

Reasons for Travel

Although business travel assumes a greater importance in the context of all traffic than it does in the context of individual travellers, it is still very much a secondary element in the overall assessment of travel motivations. Twenty-four per cent of all trips were taken for business purposes (as compared to 17% of all travellers who mentioned this as their primary reason for travelling). But 50% of all trips were taken for pleasure and sightseeing, virtually identical to the proportion (52%) reported on the basis of travellers.

Honeymoon trips, as could be expected, decline somewhat in importance when all traffic is taken into account. They account for only 5% of all trips, although they represent 9% of the reasons for travel by all travellers.

DESTINATION PATTERNS ON A COMPARATIVE BASE
OF TRAFFIC AND INDIVIDUAL TRAVELLERS

	All International Travellers	
	All Traffic %	Individual Travellers %
U.S. Territory (Net)	23	28
Guam	8	9
Hawaii	11	13
Mainland	5	6
Southeast Asia	47	43
Okinawa	17	16
Europe/UK	9	10
Canada	-	1
Other	4	2

Length of Trips

As multiple travel implies, the average length of trip is somewhat shorter when all traffic is taken into consideration than it is when equal weight is given to all travellers. Trips of one week or less increase somewhat; the very long trips decrease slightly.

Levels of Expenditure

The average amount of money spent per trip is slightly less, when all trips are taken into consideration, because of this greater incidence of shorter trips to more nearby destinations. It is a more precise measure of the true levels of expenditure in any given year, since it is self-adjusting to compensate for the infrequent traveller.

On the basis of all traffic, the average expenditure per trip is ¥295,000 --approximately $1115 dollars at the July, 1973 rate of exchange.

Other Factors

The proportion of international travellers who travel in the company of others is virtually identical, whether measured in terms of trips or in terms of individual travel experiences (57% in one case, 58% in the other). But tour travel is somewhat less common when measured on a trip basis (57%) than it is when based upon individuals (63%). By the same token, travel agents play a fractionally lesser role when judged on this basis (15%). But both tours and travel agents who serve individual travellers remain major elements, whichever measure is employed.

Seasonal patterns, again, tend to be generally comparable to those that have been described on a basis of travellers rather than of trips.

ATTITUDES TOWARD THE UNITED STATES AS A TRAVEL DESTINATION

General

There is great interest among Japanese international travellers in travelling more abroad. The further they have gone, the further they would like to go; few view Japan as a highly desirable vacation destination, and few want to return to foreign places they have already seen. The emphasis is on a continuing expansion of travel experiences.

Interest in international travel is not limited to those who have already been abroad, as the data have shown. But it is keener among this group. Asked to select a hypothetical gift from a list of seven that included a trip abroad, a trip within Japan, a new car, and others of that nature, both domestic and international travellers put "a trip abroad" in first place. But domestic travellers did so with a vote of only 33%. Pacific Area travellers picked it by 52%, and intercontinental travellers selected it by an even more overwhelming margin, 60%.

There are many factors at work in the determination of preferences among potential travel destinations. Europe is a highly prized destination, but so is the United States. And the United States itself, of course, divides into the three clear segments that have been described --Guam, Hawaii, and the mainland. To many Japanese, the mainland _is_ the United States; Guam and Hawaii, though foreign, fall into a clearly separate category.

There is a clear progression of desirability among these different destinations. One major factor in determining desirability appears to be whether the traveller has ever been there before; if he has, he is less interested in seeing it again than in going to another and new place. Another might be described as a continually broadening horizon, in which visiting one place leads to learning more about another, and aspiring to the next further step it represents.

A third is fashion or vogue, and the pressure of what appears to be group focus on specific destinations.

The United States holds a middle position on these scales of desirability. Japan itself is the lowest rung. Guam is perhaps a step up, but a small one, and it is virtually disregarded as a possible destination by those who have been abroad before. Hawaii comes next, followed by the mainland. But Europe is easily the top rung of the ladder.

The relative desirability of the United States as a destination relates directly to the potential traveller's own position on a similarly ascending scale of experience. It is a desired destination to those who have had only limited travel abroad. But it is by far secondary to Europe among those who have acquired greater exposure to foreign travel.

The reality of distance and cost is a major factor as well, of course. Hawaii is known to be less expensive to reach than the mainland; the mainland is judged to be less expensive to reach than Europe. This adds to the clarity of the scale of desirability, and probably enhances the prestige of the more distant destination. But it also tempers the actual choices that are made, or that the potential traveller believes can be made.

<u>Desirability as a Vacation Destination</u>

Europe stands out clearly in first place as the destination that international travellers say they will go to on their "next vacation". When, hypothetically, cost is removed from consideration,Europe's position is simply enhanced further.

Almost none of the international travellers mention Japan as a possible vacation spot. Only among the domestic travellers --those who have not gone abroad-- does Japan itself hold first place.

The United States is second, after Europe. When cost is eliminated from consideration, its position declines among every group except the traveller whose experience is limited to domestic Japan. Of equal importance is the fact that the preferred destination within the United States --Guam, Hawaii, or the mainland-- varies from segment to segment of the traveller population, and varies further when cost is hypothetically eliminated.

Of those who pick a foreign destination for their next vacation, the United States is named more than Europe only by the domestic traveller. Europe assumes first place, but by a narrow margin, among the Pacific Area travellers. The United States declines, and Europe jumps to a margin of preference of more than two to one, among the most experienced group --the intercontinental travellers.

The same progression occurs among the three U.S. destinations. Guam is mentioned by almost no one. Hawaii is named more than the mainland by both the domestic travellers and the Pacific Area travellers; but the mainland moves into first place, though narrowly, among those who have already travelled intercontinentally. When cost is eliminated as a factor, preference for Hawaii diminishes and shifts to the mainland.

Table XII shows the major destination areas that these travellers say they will pick for their "next vacation", and those that they say they would pick if cost were not a factor.

It is interesting to note how little desire there is to return to a place that has already been visited --even a place as large and diverse as the U.S. mainland. If cost were not a factor, only 1% of those who have been to Guam would choose it to return to. Only 3% would choose to return to Hawaii. And although the percentage is larger relative to these, it is still only 10% of those who have been to the mainland who say they would like to go back there on their next vacation.

DESTINATION PREFERENCES FOR VACATION TRAVEL

	TYPE OF TRAVELLER			
	All International	Domestic	Pacific Area	Intercontinental
"Normal" Preference	%	%	%	%
Europe	38	8	31	50
United States (Net)	25	10	27	21
Guam	2	1	4	1
Hawaii	15	7	18	8
Mainland	7	2	6	11
Japan	14	67	15	11
"Hypothetical" Preference--All Expenses Paid				
Europe	47	23	43	56
United States (Net)	22	20	26	14
Guam	1	2	1	-
Hawaii	10	12	14	3
Mainland	11	6	11	10
Japan	6	39	7	5

Desirability for Other Travel Purposes

The attraction of the United States as a destination for twenty hypothetical travel purposes was measured, relative to other areas of the world, in a series of free-response questions.

Guam emerges as a fashionable place to visit, but on a rather secondary level. This is the major dimension of image with which it is associated, but it ranks far behind Hawaii by this standard. It is associated too with beautiful beaches, but again far behind Hawaii. It finds its greatest strength of preference among Pacific Area travellers, but not among those who have been to Guam --nor among those who have travelled intercontinentally.

The image of Hawaii is similar to that of Guam, but is much more strongly positive. To the average of all international travellers, it is the leading place in all the world "where it is fashionable to go". By the same token, it is by far most associated with the concept of beautiful beaches. To a much lesser extent, it has a generally positive image as a place to go both for a tranquil vacation and for night life, and to enjoy beautiful scenery. It thus has a slightly broader image than Guam, one that covers more than a single dimension. But the keynote is its beaches and the fact that it is, at least at present, very much in vogue.

The image of the mainland is entirely different. It should really not be judged in comparison with Guam and Hawaii, because it is not perceived in their context. The principal competitor to the mainland is Europe; and in that context, the U.S. mainland suffers by comparison.

The strongest images associated with the mainland are its big cities, and the impression it gives of vast, modern technological achievement. It ranks exceptionally low in such dimensions as scenic beauty, art and culture, museums, points of historic interest. It is not a place to take a tranquil and restful vacation; it is not a place where there is a wide variety of things

to see --at least in comparison to the things that can be seen in Europe; it is not even an especially good place to make purchases.

But there are some positive points to the mainland image nevertheless. It has, of course, a fairly strong image as a place to learn things that can help one's business career. Perhaps as a tangent to this, perhaps as a result of the powerful influence that the United States has wielded on Japan itself, it is interesting to note that the mainland is the Japanese's first choice as the place to go to meet foreigners, to understand more about the world, to "become a better citizen" in Japan.

The image of Europe, of course, is all the things that the mainland U.S. is not. It is predominantly an image of scenic beauty, of museums, of a full sense of history. On a slightly lesser scale but still ahead of all others, it is a place for a variety of things to see, for learning about other cultures, for good food and for active night life --the latter points largely concentrating on France alone. It is, more than the United States, a good place to make purchases. The sum of it is that, from another perspective entirely, Europe ties with the United States for first place as the destination that is most likely to help the traveller "become a better citizen of Japan".

In all of these dimensions, Japan itself stands out sharply only on two points. It is, logically, the best place to go to visit friends and relatives. And it is the best place to take a tranquil and restful vacation.

(The point of visiting friends and relatives is, surprisingly, a minor but significant factor in travel to the mainland of the United States. Four per cent of all Japanese adults report that they have relatives in the United States, and 8% of all international travellers mention the U.S. as the "best place to go" to visit relatives. This latter proportion reaches a full 29% among those who have actually visited the mainland during the past two years.)

Table XIII shows the percentages naming each of these major areas as the most appropriate destination for twenty hypothetical travel purposes. (Alaska was included in the tabulation but not shown in this table; it was mentioned by almost no one in any context, except for 3% who mentioned it as a place to go where none of their friends had ever been.)

Activities of Hypothetical Interest

What travellers say they would like to do on their next or first visit to the U.S. mainland provides an interesting sidelight of conceivable advertising appeals.

Travellers were shown a list of several things they might want to do on the mainland --some of them things that had not been mentioned by anyone on any spontaneous basis up to that point in the interview.

First and foremost, consistent with the penchant for sightseeing that repeatedly recurs, travellers of all types say they would most want to see the scenery. A close second, and in the same sightseeing vein, they would like to be able to visit several different cities. At some distance in third place, they would like to visit historical places; fourth, to see the "wild west", and fifth, to make purchases.

It is interesting to note that of the first five activities that would most appeal to these travellers, only one --the big cities-- is generally conceived of as an activity for which the United States would be outstanding (although the "wild west" is probably implicitly outstanding as well). Scenery, points of historical interest, and making purchases are associated much more with Europe, and certainly the first two of these are relegated to minor elements in the Japanese traveller's image of the United States.

These broad preferences are common to all types of travellers. But those who have already visited the United States, if they were to return, imply that they might like to broaden their activities --to see the national parks, to get to know the people.

THE IMAGES OF MAJOR DESTINATIONS

FOR DIFFERENT TYPES OF TRAVEL*

(Among All International Travellers)

	U.S. Mainland	Guam	Hawaii	Japan	Europe
	%	%	%	%	%
Get to know big cities	56	-	-	17	10
Get to know another advanced country	49	-	-	1	18
Enjoy beaches	3	7	41	9	14
Go where it is fashionable	3	15	31	4	9
Help business, career	25	-	-	6	21
Get to know foreign people	27	-	1	2	14
Understand more about world	23	-	-	1	17
Enjoy night life	10	1	7	3	22
Become better citizen	16	-	-	5	16
Enjoy scenery	3	1	9	12	49
Learn other cultures	13	-	-	1	26
Tranquil vacation	2	2	11	33	27
Visit friends and relatives	8	-	2	43	5
See places others want to hear about	5	1	3	19	36
Variety of places/sights	7	-	1	21	27
Visit museums	6	-	-	7	55
Go where friends have not	3	-	1	1	9
Make purchases	4	-	1	13	20
Enjoy good food	2	-	2	20	28
See historic sights	2	-	-	13	43

* Minor destinations and "don't know" omitted. Read table horizontally.

All types of travellers mention these concepts as possibilities, but the experienced travellers mention them considerably more.

Table XIV shows the percentages that would be interested in undertaking a variety of specific activities on a trip to the United States.

Impressions of the United States

The impressions of returning visitors to Guam and Hawaii are generally favorable, and they concentrate strongly on the major elements that the survey findings would imply --the beautiful scenery, and enjoyment of swimming and the beaches. By the same token, the favorable aspects of both destinations that are anticipated by those who have not been there are almost exactly the same.

There is less to be said about favorable impressions of the mainland. For one thing, one out of four visitors to the mainland could think of no favorable impression at all. (Fewer than one in ten of those who visited Hawaii or Guam could recall no favorable impression.) The positive impression most often mentioned deals with the opportunity the visit gave them to "meet the people", a comment made by 17%, or approximately one out of six. Roughly the same proportion, 16%, mentioned their sightseeing to scenic or historic places, and 6% referred simply to the attractive scenery. One in ten said they were surprised that the country was not more congested, and one in twelve mentioned being favorably impressed by the big cities they visited.

This rather muted and diffuse set of impressions is of course consistent with the image of the United States that has been described. It is also consistent with the anticipations of those who have not been to the mainland at all. With the exception of the favorable mentions of people-to-people contact, those who have never been to the United States share the same general impressions, on a prior basis, as those who have been there and returned.

ACTIVITIES TRAVELLERS WOULD BE INTERESTED IN

UNDERTAKING ON A TRIP TO THE MAINLAND

	Type of Traveller		
	All International	Pacific Area	Intercontinental
	%	%	%
Experience the scenery	44	43	48
Visit several cities	41	40	41
Visit historical places	34	34	34
See the "wild west"	32	32	31
Make purchases	31	32	28
Take a restful vacation	24	23	26
Enjoy the night life	22	21	24
Visit museums	22	21	23
Visit national parks	22	18	28
Gamble	21	23	18
Get to know the American people	21	19	26
Visit the Rocky Mountains	20	18	24
Spend time on beaches	18	18	20
Go skiing	9	8	13
Go to sports events	9	8	12

The lack of a strong image of the mainland is indicated as well by the fact that more than a third of the international travellers who have not been there, are unable to articulate what favorable impressions they might expect. For Hawaii, in a similar question, only one in ten are unable to say what positive impressions they anticipate.

(Alaska is also a relatively unknown quantity to the Japanese --or else its positive image is very slight. Nearly half of all international travellers say they do not know what they might find there that they would enjoy. Among those who do, roughly four out of ten mention enjoyment of sports --presumably skiing-- and another four out of ten mention the beautiful scenery they would anticipate.)

The difficulties travellers encounter in their travel to the United States are two: the language problem is their primary concern, and food their second. Language is cited as a difficulty by one out of four visitors to both the mainland and Hawaii, though by somewhat fewer in Guam. Food, on the other hand, appears to be more of a problem on Hawaii and Guam --perhaps because of the nature of the visitors-- than it is on the mainland. Sixteen per cent spontaneously mention dislike of the food as one of their major difficulties on Guam; 12% do so for Hawaii; but on the mainland, the percentage drops to 6%.

Nearly half of the travellers to each of these destinations make no complaints at all about their trip, however.

It is interesting to note that the language problem is by far the greatest difficulty that travellers anticipate on their visits to any U.S. destination. Nearly two out of three expect to have difficulties. The fact that only one in four later complains may indicate that the problem is not as great as it is expected to be; but it must be remembered, of course, that the majority of those who have visited the mainland, at least, claim to have a speaking knowledge of English.

The anticipated difficulties with food roughly coincide with actual experience. One out of eight potential travellers believes that food in the United States will be a problem --and with the possible exception of the mainland, this is the same general proportion that later complains about it.

Specific Destinations

In terms of geographic region within the mainland, the eastern part of the United States is clearly the area of greatest interest to the Japanese traveller. New York, specifically, is the dominant point mentioned spontaneously as one they would like to visit.

More than one out of three international travellers (38%) mentioned either the eastern region or New York itself as the place they would visit if they were to visit the mainland, or visit it again. There is no major change in this preference, whether or not cost is a factor. This coincides with the general desire, already discussed, to reach to ever greater distances in travel; with the desire to "see new places" and big cities; and with the image that is held of the United States, that relegates to a relatively minor role many of the other possible attractions that the country holds.

Canada follows immediately after the eastern part of the United States as a desired destination. Sixteen per cent mention it spontaneously as a place they would like to visit in North America. The West of the United States is mentioned by the same proportion; below that, other areas of the country dwindle rapidly. Five per cent mention wanting to visit the South, notably Miami; another 5% mention wanting to visit the central area of the country. No other specific destination or region reaches the 5% level.

It has been mentioned that the Japanese traveller shows little interest in returning to a place he has already visited. In this connection, it is interesting to note that New York is not the preferred destination among those who

have already visited the mainland; only half as many of this group mentions the city specifically as do so among travellers as a whole. For those who have already visited the mainland on their last trip, Canada is the number one attraction --mentioned by 26%. And it is this group, as well, that expresses the greatest interest in visiting Miami and the South --11%. (As an individual city destination, Miami holds first place in interest among this group.) Those who have not been to the mainland before are more inclined to favor the more standard destinations.

Niagara Falls and Disneyland are the best known attractions on the mainland, with the Statue of Liberty close behind. Generally speaking, the Japanese international traveller is relatively well informed about attractions such as these. Out of ten specific attractions or areas of general interest, more than 80% of the international travellers claim awareness of five of them.

Of the ten, national parks are less well known than some of the more widely publicized attractions. But among those who have heard of them, the national parks rank quite high in the relative interest they generate. As a proportion of those aware of each one, the attraction of greatest interest to the Japanese traveller is the Grand Canyon. A close second is Niagara Falls. Banff National Park in Canada, although little known, is third in interest level among those who have heard of it; Disneyland is fourth; and Yellowstone National Park is fifth. It is perhaps significant that four out of five of those attractions that lead in interest are scenic attractions.

Table XV shows the percentages of all international travellers claiming awareness of these attractions, the percentages expressing an interest in visiting them, and the relative interest level each generates, based on the degree of awareness that exists.

AWARENESS OF AND INTEREST IN SPECIFIC ATTRACTIONS

(Among All International Travellers)

	Heard Of	Interested in Visiting	Relative Interest*
	%	%	%
Niagara Falls	89	53	60
Disneyland	89	39	44
Statue of Liberty	86	28	33
Rocky Mountains	84	30	36
Cape Kennedy	80	25	31
Grand Canyon	70	44	63
New England	56	14	25
Yellowstone National Park	41	17	41
Banff National Park	20	11	55
Everglades National Park	16	5	31

* Computed only among those aware of each attraction.

Among American cities, San Francisco and New York are the leading places travellers say they would like to visit. Again with the aid of a list, interest levels in ten cities were elicited; 46% chose San Francisco, and 45% New York. Miami is a near third, with 43%. In terms of absolute percentages, these three cities generate a degree of interest second only to the interest in Niagara Falls, and on a par with the interest expressed in the Grand Canyon. Awareness of the names of these cities was not measured, so relative interest cannot be calculated in a manner comparable to the figures shown in Table XV. But on an absolute basis alone, each of these three cities constitutes a major attraction.

Las Vegas, mentioned by 36% as a place they would like to visit, ranks fourth among these ten cities. Washington, D.C. is fifth, with 33%. Hollywood and Chicago are tied for sixth, each mentioned by 31%; others --Montreal, Denver, and Vancouver-- trail off to relatively minor percentages.

DECISION-MAKING, PLANNING, AND MEANS OF PAYMENT

Decision-Making and Planning

Only a minority of the international travellers make their travel decisions entirely alone. Fifty-seven per cent involve others in the decision, and the percentage is even higher for certain destinations. (For Guam, which is a special case, 79% consult with others before making their decisions.) The traveller's wife or husband; his friends; his employer, each become involved in roughly one-sixth of the travel decisions.

The final decision, however, is usually the traveller's own. With the exception of travel to Guam, the final decisions for which are made by the traveller in only a slim majority of the cases, four out of five trips are ultimately resolved by the traveller himself.

These decisions are not made in as much detail as might be imagined, however. The traveller only rarely decides for himself the airline he will use; in 70% of the cases, it is decided for him --either as part of his tour package, or by his employer or other sponsor. Even when individual travel is involved, the choice of airline is made by the traveller himself only half the time.

There is somewhat more flexibility than usual in choosing airlines when travel to the mainland of the United States is involved, but even in this case only 40% of the travellers are in a position to make that choice themselves. For travel to Hawaii, only 26% of the travellers decide the airline; for Guam, only 16%.

International travel is rarely taken on short notice. Considerable planning is involved. Preparations begin, as a median, approximately one month before the trip is to be taken. But some people take far longer still; because some plan as much as six months in advance, the average number of days of preparation

for all international travel extends to more than two months. For intercontinental travel, it is closer to three. For any kind of travel, only 8% begin to plan their trip a week or less before their departure.

The extent of planning varies according to the type of traveller. First-time travellers and those in the youngest age group take considerably longer than average. Those in the lowest income categories take even longer still.

Aside from discussing the possibilities of travel, four out of ten travellers say they did nothing in particular to prepare for their last trip, despite the time elapsed between decision and departure. But many are active during this period. Aside from routine functions such as receiving innoculations and applying for passports, one traveller out of six buys new clothing; one out of eight studies about the country or countries he will visit. For those who travel to the mainland of the U.S., one out of eight make an effort to learn or refresh his English. (The traveller to the mainland is especially active in preparing; 78% say they do something to prepare themselves prior to leaving.)

Means of Payment

Only half of all international travel is paid for entirely by the traveller himself. In more than a third of the cases, someone else pays for it entirely; in the balance, the expenses are shared in part by the traveller and in part by others.

The traveller's employer pays all or part of the cost for one out of four trips that are taken abroad from Japan. The bulk of this is because business travel is involved, of course, but some of it takes the form of prizes or bonuses to employees.

Because of the heavy impact of business travel, the percentage of travellers who pay their own way entirely vary considerably from one destination to another.

Trips to Guam, for example, are paid for entirely by the traveller in 70% of the cases. Trips to Hawaii are paid for by the traveller 57% of the time. But trips to the mainland of the U.S., which include a heavier proportion of business travel, are paid for by the traveller himself in only 41% of the cases.

For the same reasons, tour travel is more likely to be paid for entirely by the traveller than is individual travel. More than half of all tour travel is paid for by the traveller himself; in the case of individual travel, the proportion is nearer to four in ten. But when the costs <u>are</u> borne by someone else, the employer is the principal sponsor --regardless of the type of travel involved.

Nearly everyone who pays for the travel himself pays in <u>cash</u>. Only one out of ten travellers uses some other system; and in half of <u>these</u> cases, a part of the trip is still paid in cash, and only a part in installments. Only 2% of all trips are paid for <u>entirely</u> on the installment plan, and less than 1% are paid for by the use of credit cards.

In eight out of ten cases, these cash payments are made out of personal savings. Only one trip in fourteen that is paid for by the traveller is paid for through a work bonus he has received. Only one case in seventeen is paid for through a gift.

There are some small variations to this pattern from one destination to another. Work bonuses account for 10% and loans for 11% of the financing used to travel to Guam, for example. But loans are almost unknown for other destinations; they are used for less than 2% of other travel. Bonuses account for 6% of the travel to Hawaii and to the mainland, and outright gifts account for 8% and 7% to each of these destinations. They are, of course, used more often by the younger travellers. But as factors in the general travel pattern, none of these sources of funds even approaches the importance of personal savings.

In those relatively rare cases in which installment purchases are made, two out of three trips are paid for in twelve months or less.

Nine per cent of all international travellers have some form of credit card, but only one out of three report that they used their card in any way on their last trip abroad. Both possession and use are somewhat higher among intercontinental travellers than among those who travel for shorter distances, but the percentages are still modest. Among this group, 11% own a credit card, and 5% used it on their last trip.

JCB (Mitsui) is the leading brand of card among travellers (3%). Sumitomo Credit is second (2%). Several other brands exist, but none is mentioned by more than 1%. Given the tiny percentages involved, the relative positions of none of these cards can really be stated with any precision.

ACCESS TO INFORMATION ABOUT THE UNITED STATES, AND EXPOSURE TO PRINT ADVERTISING MEDIA

Information About the United States

Nearly all travellers who leave Japan obtain some information about their destination prior to their departure. Some of this is undoubtedly general sorts of information, perhaps obtained earlier and perhaps not directly trip-oriented. Still, 94% of those who go to Guam or to Hawaii say they get some prior information about those islands; nearly as many, 85%, get information about the mainland before they go there.

A substantial proportion indicates a desire to get more information, however. Roughly four out of ten visitors to Hawaii and to the mainland, and half of those who went to Guam, say they would have liked to be better informed. In the case of Guam, their interest lies more in the direction of obtaining information about points of interest on the island. But for all three destinations, approximately one traveller out of eight would have liked to know more about the customs and lifestyle of the people, and approximately the same proportion say they would have liked to have more orientation on the language.

(For Guam, which attracts a higher proportion of young and inexperienced travellers, one visitor in ten found himself confused with the currency exchange, and would have liked more information on that point.)

The major source of information for all of these destinations is the general media --television, radio, the newspapers. These are especially important as a source of information about Guam (37%), but are also significant for Hawaii (29%) and the mainland (23%). Books and magazines are major sources of information as well. For Hawaii and the mainland, they are virtually in a tie with the general media for first place; for Guam, they are mentioned as a source of information by 20%, only slightly more than half as many as mention radio, television, and the newspapers, but a substantial proportion nevertheless.

Discussions with other people are also a major source of orientation. One out of six travellers to Guam and Hawaii say they obtained information in this way, although only one out of ten did so with reference to the mainland.

Specific materials that are travel-related and that are directly focussed on each place as a travel destination are apparently somewhat limited. Films on tourism have some minor currency; roughly one visitor out of twenty saw such a film on his destination before he left. But brochures, which should logically be expected to be rather widespread, are mentioned by only 10% of the visitors to Hawaii, by 6% of the visitors to Guam, and by none of those who went to the mainland on their last trip. It is conceivable that brochures were received buteither lacked enough impact to be remembered or were left unread, but there is no evidence to support such a theory.

The content of most of the material to which the travellers were exposed appears to have been rather general. For Guam and Hawaii, more than half say they received information about the climate and geography of their destination. For Hawaii, there was somewhat more detail: 21% received materials on points of interest, and 16%, on entertainment in the islands.

For the mainland, however, the information obtained was generally quite obscure: 38% said they received information on "general impressions" of the country, but only 6% said they learned about specific points of interest, only 5% said they learned about its climate and geography, and only 3% learned about such things as historical sites.

Exposure to Print Media

Nearly all international travellers read newspapers at some time --98%. But only two out of three read a weekly magazine regularly, and only half read a monthly.

Among the newspapers, Asahi is dominant. Thirty-five per cent say they read it as a general rule. Mainichi is second, with 17%, closely followed by Yomiuri, with 16%. Nihon Keizai is read regularly by 8%. No other single newspaper is mentioned by more than 5% of the international travellers, but a total of ten are each mentioned by 1% or more.

Four weekly magazines are read regularly by more than 5% of these travellers. Shukan Asahi leads with 11%. Shukan Shincho and Shukan Gendai are tied for second, each with 8%; Sunday Mainichi is fourth with 7%. A total of 16 others are each mentioned by 1% or more.

Only one monthly magazine is read regularly by more than 5% --Bungei Shunju, which reaches 8% of the international travellers on a regular basis. Shufu-no-Tomo and Shufu-to-Seikatsu are each read by 3%, and a long list of 25 others are read by either 1% or 2%.

TECHNICAL NOTES

Appendix

The data presented in the preceding pages are based upon a personal-interview survey conducted in Japan during the fall and winter of 1972-73.

The procedures used in the conduct of the study are described below.

I. Universe of Study

The universe of study, or population to be represented in the sample, is defined as all adult Japanese (18 years of age and older), except for those residing in islands or areas that are especially remote or especially difficult of access. It is estimated that less than 1% of the population of Japan resides in areas excluded on these grounds.

Okinawa and the Ryukyu Islands were not considered a part of Japan for purposes of this study.

II. Stages of the Research

The study was conducted in two stages. The first had as its purpose the quantification of the incidence of international travel from Japan, both as a whole and within major population segments, and the location of international travellers for later, more detailed interview. The second stage consisted of detailed interviews among individuals designated as international travellers, together with a small sampling of domestic travellers incorporated for purposes of comparison on data relating to attitudes toward the United States as a travel destination.

A. The First Stage

Massive screening was required in this first stage, in order to locate the required number of travellers for the second stage. Disproportionate sampling was used in order to improve the efficiency of the sample, since data provided by the Japanese government indicated that the incidence of international travel was much higher from certain sections of the country than from others.

A total of 48,569 households were selected for the first stage by probability sampling techniques from electoral registers within the universe of study. Interviews were completed among 35,455. Of these, 16,644 were designated as the principal sample; within them, data on the personal characteristics and the travel of each adult family member were obtained through the housewife, who was the designated respondent in each case. All of the data shown on "Sources of Travel" stem from these interviews.

The balance of the households were used solely to locate eligible respondents for the second stage, as a supplement to the 16,644 "full" interviews. Questions were limited to determining whether an eligible respondent lived in that household, and identifying him for the second stage.

Because of the varying incidence of travel in different regions of Japan, disproportionate sampling was employed. The Keihin (Tokyo-Yokohama) and Hanshin (Osaka-Kobe) areas were heavily oversampled, since these were known to be the source of a large proportion of overseas travellers. The disproportions created by this procedure were compensated at the time of tabulation by upweighting other portions of the sample by a factor of five. This procedure was followed for interviews originating in the undersampled areas for both Stage I and Stage II.

Multi-stage probability sampling was used in the design of this sample. The first-stage units were the smallest administrative districts with published census statistics of population, i.e., Cho (towns) and Son (villages) in the rural areas and Shi (cities) and Ku (wards) of the largest cities in the urban areas. The second-stage units were the geographical clusters of 150 households recorded in a single volume of the Japanese National Register maintained in local offices. The third-stage units were the households themselves.

B. The Second Stage

The screening interviews identified 938 intercontinental travellers and 1,130 travellers within the Pacific Area. In addition, a sub-sample of 652 domestic travellers was designated from the far larger number of this type that was found.

Attempts were made to interview all designated respondents in these three groups. With repeated call-backs, interviews were successfully completed among 507 intercontinental travellers, 718 Pacific Area travellers, and 439 domestic travellers. The sampling mortality stemmed from the following causes:

	Intercontinental	Pacific Area	Domestic
Initial sample	938	1130	652
Completed interviews	507	718	439
Absentees	203	162	113
Refusals	149	154	61
Moved, not located, sick	70	90	34
Others	9	6	5

The initial survey requirements called for completing approximately 700 interviews among each type of international traveller, and 400 among the domestic travellers. The total number of intercontinental travellers fell below this requirement after mortality. After consultation with USTS, it was decided to supplement the 507 interviews accomplished through probability sampling with quota supplements, controlled in terms of sex and age to conform to the demographic structure of the initial group. 201 additional interviews were carried out on this basis. After review, it was discovered that 16 of these were actually Pacific Area travellers rather than intercontinental; these were added to the Pacific Area group.

Sampling mortality was especially high in the Keihin area, the largest geographic source of international travellers. Quota sampling supplementation was carried out entirely in the Keihin area.

The requirements of the study called for the numbers of interviews among the two types of international traveller to be roughly equal, yet the incidence of these travellers in the population was not equal. In addition, therefore, to the weighting that was employed to correct for geographic disproportions, a further weight was incorporated to bring the intercontinental and Pacific Area travellers into their correct relationships to each other. This was accomplished by multiplying the responses of all intercontinental travellers by a factor of 1.6.

III. Administration

The project was carried out through the combined efforts of Gaither International and Japan Market Research Bureau. All pre-testing and field work was carried out by female interviewers, members of the regular field staff of JMRB in Japan. Coding of the field responses was also completed in Japan. Tabulations were accomplished by computer in New York.

Any additional information which may be desired on the methods used in the conduct of the study will gladly be provided on request.

GAITHER INTERNATIONAL, INC.

STUDY ON TRAVEL

- Nov., 1972 -

Japan Market Research Bureau

Project No. 147

Area No.	HH No.	Ind. No.	Stratum

Int'wer
Inspector

1

1 2 3 4 5 6 7 8 9 10 11 Interview starts:

_____________ am/pm

(To respondents of stratum 1 or 2) Have you taken a trip outside Japan, including Okinawa, during the past 2 years, i.e., sometime between September 1970 and now? (if yes) Where did you go?

SQ 1-a trip abroad	
	Have not → end int.

(To respondents of stratum 3) Have you taken a trip within Japan during the past 2 years that took you two days or more? (if yes) Where was the most distant place you traveled?

SQ 1-b trip within Japan	
	Have not → end int.

12

(To All)

Q1. (SHOW CARD 1) If you had the money to buy or do any of the things on this list, for which one of them do you think you would prefer to spend your money? (SA)

Q1a. Which would be your second choice? (SA)

	Q1 1st	Q1a 2nd
AN AUTOMOBILE	1	1
A COLOR TV SET	2	2
A NEW WARDROBE	3	3
A REFRIGERATOR/FREEZER COMBINATION	4	4
A TRIP ABROAD	5	5
A POWER BOAT	6	6
A TRIP WITHIN JAPAN	7	7
NONE OF THESE	8	8

13

14

(Q2 to Q33 to be asked to "overseas travelers" only)

Q2. (I understand that you have recently traveled outside of Japan). Could you tell me when you took your most recent trip outside of Japan? (In what month of the year did you begin the trip?)

Yr.			Month												
70	71	72	Ja	F	Mr	A	M	Je	Jy	Ag	S	O	N	D	(15)
1	2	3	1	2	3	4	5	6	7	8	9	0	X	Y	(16)

Q3. How long did the trip last in all, from the time you left your home until you returned?

Q3 Duration				days
	(17)	(18)	(19)	

Q4. What other places did you visit? Please name them for me, starting with your first stop of one day or more and going on from there, so that I can note them all down. Please mention what city in what state or what country specifically. (OE)

Q5. What was the most distant place you visited on this trip? (SA)

Q5 most distant place	Q4 Places Visited		Q6. Lodging					
	Country	City/State	Hotel	Motel	Private	Tourist home	Youth dormi.	Other
1			1	2	3	4	5	6
2			1	2	3	4	5	6
3			1	2	3	4	5	6
4.			1	2	3	4	5	6
5			1	2	3	4	5	6
6			1	2	3	4	5	6
7			1	2	3	4	5	6
8			1	2	3	4	5	6
9			1	2	3	4	5	6
10			1	2	3	4	5	6

Q6. (SHOW CARD 2) By the way, in what kind of lodging did you stop in (EACH PLACE)?

(Q.5) [ ][ ] (20) (21)

(To those who mentioned mainland U.S., Guam,)
Hawaii, Alaska and Canada)

Q7. For how long a time in all, were you in x x x ?

(ask for each mentioned in Q4)

	Days of sojourn	Office use	
Guam			22 23 24
Hawaii			25 26 27
Alaska			28 29 30
Mainland US			31 32 33
Canada			34 35 36
	(Europe)		37
	(Asia)		38
	(Other)		39

Q8. What was the principal means of transportation you used on this trip? (SA)

Q9. (IF RESPONDENT MADE MORE THAN ONE STOP IN Q4) Did you use any other means of transportation to travel from one place to another? (Which?) (MA)

	Q8 PRINCIPAL	Q9 OTHER
AIRPLANE	1	1
SHIP	2	2
TRAIN	/	3
RENTED CAR	/	4
BUS	/	5
OTHER (SPECIFY)	/	6
	40	41

(To those who traveled by plane in Q8, 9)

Q10. (SHOW CARD 3) What airline did you fly on? (Any other?) (MA)
(If more than one airline in Q10).

Q11. Which of these was the airline you flew on for the greatest distance? (SA)

	Q10. All air-lines used	Q11. Greatest distance		Q10. All airlines used	Q11. Greatest distance	
Japan Airlines	1	1	K. L. M.	X	X	42
Pan American	2	2	American	Y	Y	43
Northwest	3	3	Scandinavian A.S.	1	1	
Air France	4	4	Canadian Pacific	2	2	
Cathay Pacific	5	5	Aeroflot	3	3	
B.O.A.C.	6	6	QANTAS	4	4	
Lufthansa	7	7	Thai Airways	5	5	
Swissair	8	8	Garuda	6	6	
Trans World	9	9	United Airlines	7	7	44
MSA	0	0	Other ( )	8	8	45

Q12. Did you use any local transportation within any of the cities you visited? (IF "YES") What kinds?

	Q12. means	
RENTED CAR	1	
PRIVATE CAR	2	
BUS	3	
SUBWAY	4	
TAXI	5	
OTHER ( )	6	46
NONE	7	

Q13. By the way, did you travel alone on this trip, or did friends or someone else in your family accompany you? (SA)

ALONE	1	→ To Q14
ACCOMPANIED	2	

47

(If accompanied in Q13)

Q13a. Who accompanied you? (NOTE RELATIONSHIP AND THE TOTAL NUMBER OF COMPANIONS, WITHOUT INCLUDING THE RESPONDENT)

	Total Number	Relationship						Sex		Age
		Grand parent	Parent	Spouse	Children	Bros/ sist.	Pal	M	F	
Q 1 3 COMPANION	1	1	2	3	4	5	6	1	2	
	2	1	2	3	4	5	6	1	2	
	3	1	2	3	4	5	6	1	2	
	4	1	2	3	4	5	6	1	2	
	5	1	2	3	4	5	6	1	2	
	6	1	2	3	4	5	6	1	2	
	7	1	2	3	4	5	6	1	2	
	8	1	2	3	4	5	6	1	2	

48

Q14. What was it that made you want to take this trip, specifically? (OE)

Q14. MOTIVATION/PURPOSE/REASON

49 50

Q15. What (other things) did you have in mind to do on this trip? (PROBE)

Q15. SECONDARY MOTIVATION/PURPOSE/ REASON

51 52

(If "business" or "study" are mentioned as purpose of trip, ask Q16. If not, skip to Q17)

Q16. Of the total time you were away from Japan, what proportion did you spend on things other than business/study?

Q16 [ ] 0%

53

Q17 Was this a trip that you undertook on your own or was it a tour?

INDIVIDUAL TRIP	1	→ To Q19
TOUR	2	

(54)

(If Tour in Q17, ask Q18)

Q18a. (IF TOUR) Could you tell me what the tour was called?

Q18a. NAME OF TOUR: (55)

Q18b. What was the tour's purpose or theme?

Q18b. THEME OF TOUR: (56)

Q18c. (SHOW CARD 5) Which of these factors would you say was the most important in your choosing to go on this tour? (SA)

Q18d. Which was the second most important factor? (SA)

	Q18c 1st Place	Q18d 2nd Place
THE DESTINATION COUNTRIES IT INCLUDED	1	1
THE NUMBER OF COUNTRIES IT INCLUDED	2	2
THE THEME OR PURPOSE OF THE TOUR	3	3
THE NUMBER OF DAYS IT INCLUDED	4	4
TRAVEL AGENT RECOMMENDED IT	5	5
OTHER PEOPLE RECOMMENDED IT TO ME	6	6
THE TYPES OF PEOPLE GOING ON THE TOUR	7	7
NONE OF THESE	8	8
	(57)	(58)

Q18e. Was there anything else that made you decide on this tour rather than some other tour? (What?)

Q18e. OTHER REASONS FOR CHOICE: (59)

(To overseas travelers)

Q19a. Did other people take part in the decisions about the trip, or not?

YES	1	
NO	2	→ To Q20a

(60)

(If "paid entirely by self" or "paid partly by self" in Q20b)

Q20d. Was the cost that you paid (for this tour) --the part that was paid for in Japan-- paid in cash (when the tour was purchased,) paid partly in installments, paid for by credit card, or paid for in installments? (SA)

In Cash	Partly in cash; partly in installments	Credit Card	Entirely in installments
1	2	3	4
To Q20e		To Q20f	

70

(If "in cash" or "partly in cash and partly in installments" in Q20d)

Q20e. (SHOW CARD 6) Did you pay for this out of your personal savings, or was it paid from a work bonus, a gift, or a loan?

SAVINGS	1
WORK BONUS	2
GIFT	3
LOAN	4
OTHER	5

71

(If "partly in cash and partly in installments" or "in installments" in Q20d)

Q20f. Over how many months were the payments for the trip spread?

Q20f		

Times/ Months

72 73

(If Yes in Q19a)

Q19b. Who? (SPECIFY RELATIONSHIP OR OTHER CONNECTION WITH THE RESPONDENT).

	Spouse	Parent	Bros/Sist.	Friend	Fiance/Fiancee	Other ( )
Q19b	1	2	3	4	5	6

61

Q19c. Did you make the final decision to take this trip, or did someone else?

RESPONDENT DECIDED	1	→ To Q20a
OTHER DECIDED	2	

62

(If "someone else" in Q19c)

Q19d Who made the final decision? (SPECIFY RELATIONSHIP OR CONNECTION WITH THE RESPONDENT)

	Spouse	Parent	Bros/Sist.	Friend	Fiance/Fiancee	Other ( )
Q19d	1	2	3	4	5	6

63

(To overseas travelers)

Q20a. Could you tell me what the (total price of the tour was) (amount of the main cost of your trip was) --that is, the price you agreed to pay in Japan? Please tell me as precisely as possible.

Q20a. Paid amount ¥				
	64	65	66	67

000

Q20b. Was this cost (of the tour) paid for entirely by you; partly by you and partly by others; or entirely by others? (SA)

	Entirely by self	Partly by self	Entirely by others
Q20b paid	1	2	3

↳ To Q20d

68

(If "partly by self" or "entirely by others" in Q20b)

Q20c Who helped you? Please tell me if possible. (MA)

	Family	Employer	Friend/acquaintance	Other ( )
Q20c helped	1	2	3	4

69

2
12 - 11
Dup

Q21a. I know that it is difficult to remember everything that you spend on a trip like this.

(For Individual Trip)

Including the main cost of the trip that you have already mentioned, how much would you say that you (and those in your family who accompanied you) spent in all on this trip, including everything that you did and everything that you bought while you were away from Japan?

(For Tour)

Aside from the main cost of the trip that you have already mentioned, how much would you say that you (and those in your family who accompanied you) spent in all on this trip, including everything that you did and everything that you bought while you were away from Japan?

(If "Individual trip" in Q17)

21b. Let's take it step by step. How much would you say that you spent on transportation, thinking only about the principal means of transportation you used?

	Original	Revised	
Q21a Total	¥ ___ 000	¥ ___ 000	12 13 14 15 / 16 17 18 19
Q21b Main Transportation cost (Individual)	¥ ___ 000	¥ ___ 000	20 21 22 23 / 24 25 26 27
Q21c Other transportation	¥ ___ 000	¥ ___ 000	28 29 30 31 / 32 33 34 35
Q21d Lodging	¥ ___ 000	¥ ___ 000	36 37 38 39 / 40 41 42 43
Q21e Food	¥ ___ 000	¥ ___ 000	44 45 46 47 / 48 49 50 51
Q21f Purchase	¥ ___ 000	¥ ___ 000	52 53 54 55 / 56 57 58 59
Q21g Miscellaneous	¥	¥	60 61 62 63 / 64 65 66 67

(To all overseas travelers)

Q21c. Let's take it step by step. How much would you say you spent for any local transportation you used at your destinations -- that is for taxis, local buses, cars, and everything else like this?

Q21d. Now I would like you to think about your lodgings. How much would you say that you spent in all for lodgings during your trip?

Q21e. Did you spend anything for food and drinks, aside from the meals that were included in the arrangements for the tour? (IF "YES") How much would you say you spent for food and drinks?

Q21f. Now, think about the purchases you made, whether they were for you yourself, for your family, or for other people. How much would you say you spent in all on purchases -- souvenirs, presents, etc.?

Q21g. Finally, think about all the other things that a person can spend money on during a trip -- sightseeing tours, tips -- everything that takes money. Just taking a guess, how much would you say you spent on this kind of thing in all?

(NOTE TO INTERVIEWER: ADD THE FIGURES GIVEN FOR EACH PART, AND CHECK THEM AGAINST THE TOTAL IN Q21a. REVISE THE DIFFERENCES BY PROBING, FORCING THE PARTS TO ADD TO THE TOTAL. NOTE THE CORRECTED FIGURES TO THE SIDE OF THE ORIGINAL ONES, WITHOUT CHANGING THE ORIGINALS.)

(If "airplane" inQ8)

Q22. Did you (or your companions) make the decision as to which airline or airlines to use on this trip, or was the airline already determined (as part of the overall tour you purchased)? (SA)

	Traveler's decision	Airline already determined
Q22	1	2

68

(To those who took "tour" in Q17)

Q23a. Now I'd like you to think for a moment about the things that happened before you began this trip. For example, how long before you took this trip did you begin to plan for it? (OE)

Q23a/b. [| |] days

69 70 71

(To those who took individual trip)

Q23b. Now I'd like you to think for a moment about the things that happened before you began this trip. For example, how long before you took this trip did you know you were going to take it?

(To all overseas travelers)

Q24. What were the principal things that you did to prepare yourself for this trip, once you decided that you wanted to take it?

Q24. PREPARATIONS:

72 73

(To those who took "individual travel" in Q17)

Q25. By the way, did you use a travel agency in any way for this trip, or not? (SA)

	Yes	No	
Q25.Agency	1	2 → To Q27	74

(If "Yes" in Q25)

Q26. (SHOW CARD 7) Which of these things did the agency do for you?

ARRANGED TRANSPORTATION SPACE	1	
ARRANGED LODGING	2	
ARRANGED SIGHTSEEING	3	
ARRANGED COMPLETE ITINERARY	4	75

3
1 2 - 11
Dup

(To all overseas travelers)

Q27. By the way, do you have a credit card of any kind either for your personal use or for business use? (SA)

	Yes	No	
Q27.Credit Card	1	2 → To Q31	12

(If "Yes) in Q27)

Q28. What credit card or cards do you have? (MA)

Q28.NAME OF CREDIT CARD	
NIPPON SHINPAN	1
J. C. B. (MITSUI)	2
UNION CREDIT (DAIICHI KANGIN)	3
DIAMOND CREDIT (MITSUBISHI)	4
SUMITOMO CREDIT	5
MILLION CARD (SANWA)	6
NIPPON DINER'S	7
AMERICAN EXPRESS	8
CARTE BLANCHE	9
OTHER ( )	0

13

Q29. Did you use this credit card in any way for this trip, or not (SA)

	Yes	No
Q29	1	2 → To Q31

14

(If "Yes" in Q29)

Q30. Did you use it to pay for the main cost of the trip, did you use it only while you were abroad, or did you use it both ways?

Q30. How C.C. used	
Main cost	1
Only while abroad	2
Both	3
Other ( )	4

15

(SEE Q2. IF LAST TRIP WAS LESS THAN TWELVE MONTHS AGO, ASK Q31)

Q31. Before this trip, have you taken any other trip outside of Japan during the last twelve months -- that is, since the month of November 1971 -- or not? (SA)

	Yes	No
Q31. Other overseas trip(s)	1	2 → To Q3

16

(If "Yes" in Q31)

Q31a. How many other trips abroad have you taken during the last twelve months, besides the one we just talked about?

Beside the current trip [ ] time(s) 17

(ASK THE QUESTIONS ON ANOTHER SHEET ATTACHED FOR EVERY TRIP ABROAD TAKEN DURING THE LAST TWELVE MONTHS, ASIDE FROM THE LAST TRIP ALREADY DISCUSSED.)

Q32. (See the paper attached.)

(To those who answered "No" in Q31)

Q33. Was this trip we've been talking about your first trip outside of Japan, or had you been abroad before?

	First-time	Not first time
Q33. Overseas trip	1	2

18

(To all respondents)

Q34. For your next vacation, what place do you think you will go?

Q34. WILL GO TO

19 20

Q34a. Let's suppose that your next vacation were free, with all your expenses paid. Where would you prefer to go if it were a completely free trip?

Q34.a. IF FREE, WOULD GO TO

21 22

Q35. (SHOW CARD 8) If you were to take a trip for ..., what place or what countries would you prefer to visit? You can name Japan itself or any foreign country. In second place? (IF UNITED STATES, SPECIFY MAINLAND, HAWAII, GUAM, ALASKA OR OTHER)

	1st place	2nd place	
35a. To take a tranquil and restful vacation ..			23 24 25 26
35b. To visit friends or relatives			27 28 29 30
35c. To see a wide variety of different places and sights of interest			31 32 33 34
35d. To make purchases			35 36 37 38
35e. To meet foreign people and come to know them better			39 40 41 42
35f. To get to know another modern, advanced country			43 44 45 46
35g. To visit beautiful beaches			47 48 49 50
35h. To go to places where it is fashionable to go.			51 52 53 54
35i. To learn about other cultures and other ways of life.			55 56 57 58
35j. To enjoy an exciting night life			59 60 61 62
35k. To understand more about the world.			63 64 65 66
35l. To go somewhere that most of your friends have not been to.			67 68 69 70
35m. To become a better and more knowledgeable citizen.			71 72 73 74

	1st place	2nd place	
35n. To see beautiful scenery.			75 76 77 78 4
35o. To visit museums.			1 2 - 11 Dup 12 13 14 15
35p. To get to know big cities.			16 17 18 19
35q. To learn things that can be helpful in your business or your career.			20 21 22 23
35r. To see places that other people will be interested in hearing about when you return.			24 25 26 27
35s. To enjoy good food.			28 29 30 31
35t. To visit places of historic interest.			32 33 34 35

(To overseas travelers)

36. (SHOW CARD 9) Among these things which would you say was the most important purpose of the last trip you took outside of Japan? (SA)

Q36. Purpose of Overseas Trip		
TRANQUIL VACATION	1	
VISIT RELATIVES	2	
SEE VARIETY OF SIGHTS	3	
MAKE PURCHASES	4	
MEET FOREIGN PEOPLE	5	
GET TO KNOW MODERN COUNTRY	6	
VISIT BEACHES	7	
GO TO FASHIONABLE PLACES	8	
LEARN ABOUT OTHER CULTURES	9	
ENJOY NIGHT LIFE	0	
UNDERSTAND THE WORLD	X	
GO WHERE FRIENDS HAVE NOT BEEN TO	Y	36
BECOME BETTER CITIZEN	1	
SEE BEAUTIFUL SCENERY	2	
VISIT MUSEUMS	3	
KNOW BIG CITIES	4	
HELP BUSINESS, CAREER	5	
VISIT PLACES OTHERS ARE INTERESTED IN	6	
ENJOY GOOD FOOD	7	
VISIT PLACES OF HISTORICAL INTEREST	8	
OTHER (SPECIFY)	9	37

Q37. Do you have any plans to travel abroad again in the near future? (SA)

	Yes	No
Q37 Plan	1	2 → To Q38

38

(If "Yes" in Q37)

37a. (IF "YES") Where do you think you may go on this next trip? (OE)

Q37a. Place

39
40

(To all respondents)

Q38. If you were to take (another) vacation trip abroad, would you prefer to go on a tour with a group, or on a private trip you arranged yourself? (SA)

	Tour	Private trip
Q38. Type of trip	1	2

41

Q39. (SHOW CARD 10) Which of these places in North America have you ever heard of? (MA)

GRAND CANYON	1
DISNEYLAND	2
NEW ENGLAND	3
ROCKY MOUNTAINS	4
CAPE KENNEDY	5
NIAGARA FALLS	6
THE EVERGLADES	7
YELLOWSTONE NATIONAL PARK	8
STATUE OF LIBERTY	9
BANFF NATIONAL PARK	0
NONE OF THESE	Y

42

Q40. Have you traveled to or through the following places during the past 2 years? (MA) How about Guam..., then Hawaii? What about Alaska, and also Mainland U.S.?

	Guam	Hawaii	Alaska	Mainland U.S.	Not traveled to or thru / Not informed of any Place	
Q40 to or thru	1	2	3	4	5	To Q41
Q40a Informed	1	2	3	4	5	To Q41

43 44

(To those who traveled to or thru place)

Q40a. In your trip to xxx (for each traveled to or thru) did you obtain any information about the place before taking the trip, or not? (If "Yes") What type of information did you obtain? (OE)

	(Guam)	(Hawaii)	(Alaska)	(U.S. Main)	
Q 40a. Information					45 46 47 48
Q 40b. Source					49 50 51 52

(To those who had information)

Q40b. Where did you get it? (Ask for each.)

Q40c. Would you have liked to have more information before you began your trip, or would you say that you had enough? (SA)

	Would have liked more	Had enough	
Q40c.	1	2	53 To Q41

(If "more information wanted" in Q40c)

40d. What type of information would you have wanted to have? (OE)

Q40d. Type desired

(54)

(To all respondents)

5
(1)(2) - (11)
Dup

Q41. Have you visited the following areas during the past 2 years? How about Guam, then Hawaii? How about Alaska and finally what about mainland U.S.?

	Guam	Hawaii	Alaska	Mainland U.S.	Move not any
Q41	1	2	3	4	5

5 → To Q42

(If any place visited in Q41)

Q41a. What would you say were the things that most impressed you as pleasant or interesting in your trip to xxx? (OE)
Then, what about ooo?

Q41b. What would you say were the biggest problems or difficulties that you experienced in your trip to xxx? (OE)
Then, what about ooo?

	(Guam)	(Hawaii)	(Alaska)	(U.S.Main)	
Q41a. Pleasant or interesting					(12) - (19)
Q41b. Problem or difficulties					(20) - (27)

(If respondent has not visited each place)

Q42. If you were to visit xxx, what do you think would be the most pleasant or interesting things for you? (OE) (Repeat for each place not visited)

	(Guam)	(Hawaii)	(Alaska)	(Mainland U.S.)
Q42. Most pleasant things				

28 - 35

(To those who have not visited Mainland U.S.)

Q43. If you were to visit Mainland U.S., what do you think would be the biggest problems or difficulties that you would have? (OE)

Q43. Biggest problems/difficulties

36 37

(To all respondents)

Q44. If you were to choose an airline to fly to the mainland of the United States, what airline do you think you would choose? (SA)

Then, which would you choose to go to Guam?
to Hawaii?
Alaska?

	Mainland US	Guam	Hawaii	Alaska		Mainland US	Guam	Hawaii	Alaska
Japan Airlines	1	1	1	1	K.L.M.	X	X	X	X
Pan American	2	2	2	2	American	Y	Y	Y	Y
Northwest	3	3	3	3	Scandinavian A.S.	1	1	1	1
Air France	4	4	4	4	Canadian Pacific	2	2	2	2
Cathay Pacific	5	5	5	5	Aeroflot	3	3	3	3
B.O.A.C.	6	6	6	6	QANTAS	4	4	4	4
Lufthansa	7	7	7	7	Thai Airways	5	5	5	5
Swissair	8	8	8	8	Garuda	6	6	6	6
Trans World	9	9	9	9	United Airlines	7	7	7	7
MSA	0	0	0	0	Other ( )	8	8	8	8
	38	39	40	41		42	43	44	45

Q45. If you were to visit the mainland of North America (again), what places do you think you would go to? (Any other?) (OE)

Q45 PLACES

(46)(47)

Q45a. If all destinations in North America cost the same to reach, what places do you think you would go to? (OE)

PLACES IF COST NOT A FACTOR

(48)(49)

Q46. (SHOW CARD 10b) Among this list of cities and attractions, which would you be most interested in visiting? You can name one or several. (MA)

Grand Canyon	1
San Francisco	2
Disneyland	3
Denver	4
New England	5
Chicago	6
Cape Kennedy	7
New York	8
Niagara Falls	9
Washington D.C.	0
The Everglades	X
Miami	Y
Yellowstone National Park	1
Las Vegas	2
Statue of Liberty	3
Hollywood	4
Banff National Park	5
Vancouver	6
Rocky Mountains	7
Montreal	8
Don't know	9

(50)(51)

Q47. (SHOW CARD 11) Which of these things do you think you would be most interested in doing in the mainland of the United States (if you were to go back there)? (MA)

Visit museums	1
Make purchases	2
Gamble	3
Visit several cities	4
Experience the scenery	5
See the "Wild West"	6
Enjoy the night life	7
Get to know the American People	8
Visit historical places	9
Take a restful vacation	0
Go to sports events	X
Spend time on the beaches	Y
Go skiing	1
Visit the Rocky mountains	2
Visit National Parks	3
Don't know	4

(52)(53)

Q48. By the way, how many vacations have you taken in the last year that lasted a week or longer? (OE)

54 55 [|] times

(If no vacation taken, record 00 and skip to Q50)

(If once or more often in Q48)

Q49. Do you take these vacations more or less the same season of the year each time, or do you take them at different seasons from one vacation to the next? (SA)

	Same dates	Different season	Depends
Q49	1	2	3

56

(To all respondents)

Q50. From what date to what date did you take your last vacation, no matter how long or short it was?

Mth. [ ] Day [|] to Mth. [ ] Day [|] 57 58 59 60 61 62

(Oct...0, Nov...X, Dec...Y)

(To all respondents)

Q51. What newspapers do you read most as a general rule?

Asahi	1	Hokkaido	8	Sports Nippon	5
Mainichi	2	Kahoku Shimpo	9	Daily Sports	6
Yomiuri	3	Chunichi	0	Yukan Fuji	7
Sankei	4	Chugoku	1	Seikyo	8
Nihon Keizai	5	Nishi Nihon	2	Other ( )	9
Nihon Kogyo	5	Hochi	3		
Nikkan Kogyo	7	Nikkan Sports	4	Do not read	0

63 64

Q52. What weekly magazines do you read most often, as a general rule?

Shukan Asahi	1	Shukan Post	9	Young Lady	5
Asahi Journal	2	Shukan Myojo	0	Shukan Josei	6
Sunday Mainichi	3	Shukan Heibon	X	Economist	7
Shukan Yomiuri	4	Heibon Punch	Y	Shukan Toyo Keizai	8
Shukan Sankei	5	Playboy	1	Shukan Diamond	9
Shukan Shincho	6	Shukan TV Guide	2	Asahi Graph	0
Shukan Bunshu	7	Josei Jishin	3	Mainichi Graph	X
Shukan Gendai	8	Josei Seven	4	Other ( )	Y

65 66

Q53. What monthly magazines do you read most often?

Bungei Shunju	1	Tabi	3	Fujin Gaho	7
Reader's Digest	2	Heibon	4	Mrs.	8
Gendai	3	Myojo	5	Madam	9
Chuo Koron	4	Ushio	6	Katei Gaho	0
President	5	Sekai	7	Katei Zenka	1
Nikkei Business	6	Iye-no-Hikari	8	Woman	2
Taiyo	7	Shufu no Tomo	1	Shin Fujin	3
All Yomimono	8	Fujin Club	2	Shopping	4
Shosetsu Shincho	9	Shufu to Seikatsu	3	Nutrition & Cook'g	5
Shosetsu Gendai	0	Fujin Seikatsu	4	Cook	6
Shosetsu Hoseki	1	Fujin no Tomo	5	Bisho	7
Ryoko Yomiuri	2	Fujin Koron	6	Other ( )	X

67 68 69 70

Q54. Could you tell me how old you are? (OE)

[|] yrs. old

71 72

Q55. (SHOW CARD 12) Could you tell me your marital status? (SA)

Male			Female		
Single	Married		Single	Married	
	At present	Widower/ Divorced		At present	Widow/ Divorced
1	2	3	4	5	6
(a)	(b)	(c)	(d)	(e)	(f)

73

Q56. (SHOW CARD 13) What is your family status? (SA)

Household head		1	(a)
	Spouse	2	(b)
	Child	3	(c)
	Parent	4	(d)
Other		5	(e)

74

Q57. What is your principal occupation? (If "salaried" in Q57) (SHOW OCCUPATION CARD) What is your job according to this card? (SA)

OCCUPATION:

____

Self employed		1
Professional		2
Execut./Manag.		3
SALARIED	Security	6
	Production	5
	Transportation	5
	Sales	5
	Clerical	4
	Managerial	4
	Technical	4
	N.A.	4
Factory worker/ store clerk		5
Laborer		6
Agr./forest./fish.		7
Student		8
Other		9
No occupation		0
N.A.		X
		75

Q58. Do you speak a foreign language? (If "Yes"), what language do you speak? (MA)

Q59. Did you study a foreign language? (If "Yes"), what language did you study? (MA)

Q60. Please tell me the school you were graduated from? (SA)

Q 58	Yes	English	1
		German	2
		French	3
		Other	4
	No		5
Q 59	Yes	English	1
		German	2
		French	3
		Other	4
	No		5
Q 60	Compulsory		1
	High School		2
	College/Univ.		3
	None		4
			76 77 78

Q61. (SHOW CARD 14) Looking at this card, would you please tell me which of these categories comes the closest to your expenditures as a family during a typical month?

Up to ¥30,000	1	(a)
¥30,000 - 39,999	2	(b)
40,000 - 49,999	3	(c)
50,000 - 59,999	4	(d)
60,000 - 69,999	5	(e)
70,000 - 79,999	6	(f)
80,000 - 89,999	7	(g)
90,000 - 99,999	8	(h)
100,000 - 119,999	9	(i)
120,000 - 139,999	0	(j)
140,00 & over	X	(k)
NA	Y	(l)

79

Q62. In all, how many people of your family live here in this house, counting yourself and the children?

[ ] persons

80

(If 10 & over, record X)

Area No.	HH No.	Indiv. No.	Stratum

(To those who answered "Yes" in Q31)

Q32. In what month of the year did you begin these trips? For example, the trip you took just before the one we have been talking about ... In what month was that? (And the one before that?)

(Ask Q32a to Q32j for each of the trips)

Q32a. What was the most distant point you visited on the trip you took in ... (MONTH) ... ? (OE)

Q32b. In total, how long were you away from home on the trip that took you ... (DESTINATION) ... ?

Q32c. (IF APPROPRIATE) Did you pass through Guam, Hawaii, the mainland of the United States, or Canada on this trip, or not?

(For each place passed thru)

Q32d. For how long, in total, did you stay in (Guam) (Hawaii) (the mainland of the United States) (Canada)?

Q32e. What was the principal means of transportation that you used? (SA)

Q32f. Did you travel alone or were you accompanied by friends or by others in your family? (SA)

Q32g. Was this trip a trip that you undertook alone, or was it a tour? (SA)

(If "individual travel" in Q32g)

Q32h. Did you use a travel agency in any way for this trip, or not? (SA)

Q32i. What was it that made you want to take this trip? (OE)

Q32j. How much would you say you spent on this trip in total?

	(32) MONTH	(32a) FARTHEST POINT	(32b) DURATION	(32c - 32d) GUAM	HAWAII	MAINLAND USA	CANADA
1.	Yr. 7 ☐ Mth ☐☐		☐☐☐ days	1.Yes ☐☐☐ 2.No	1.Yes ☐☐☐ 2.No	1.Yes ☐☐☐ 2.No	1. Yes ☐☐☐ 2. No
2.							
3.							
4.							
5.							
6.							

	(32e) MEANS OF TRANSPORTATION	(32f) COMPANION		(32g) TRIP WAS PRIVATE/TOUR		(32h) TRAVEL AGENCY YES NO		(32i) REASON/PURPOSE FOR TRIP	(32j) EXPENSES
		Accomp.	Alone	Private	Tour	Yes	No		
1.	Airplane 1 Ship 2 Train 3 Others 4	1	2	1	2	1	2		¥ ☐☐☐☐ 000
2.									
3.									
4.									
5.									
6.									